IBM Tealeaf cxView
Version 9 Release 0.1
December 4, 2014

cxView User Manual

Note
Before using this information and the product it supports, read the information in "Notices" on page 105.

This edition applies to version 9, release 0, modification 1 of IBM Tealeaf cxView and to all subsequent releases and modifications until otherwise indicated in new editions.

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Contents

cxView User Manual v

Chapter 1. Overview of cxView 1
Access 1
Scorecards 1
Dashboards 2
Report Scheduling 2
Import/Export 3
Administration 3
cxView Features 3

Chapter 2. Using Scorecards 5
Scorecard Terminology 5
General Scorecard Terms 5
Scorecard types 6
Business Process Scorecard Terms 6
KPI Scorecard Terms 6
Scorecard Report Data 7
Displaying Scorecards 7
Scorecard toolbar 8
Opening a Scorecard 8
Date Selector 9
Configuring scorecard period 9
Configuring for different dates and comparison periods 10
Scheduling Scorecard Snapshots 10
Exporting Scorecards 12
Overview of KPI Scorecards 13
KPI Summary 13
Details 14
KPI Details 14
Metrics 14
Total Activity 14
Indicator 14
Multiple KPI Scorecards 15
Overview of Process Scorecards 15
Key Metrics 16
Rates 17
Process Step 17
Detail drilldown 18
Process Step Dropoff 18
Count drilldown 18

Chapter 3. Configuring Scorecards . . 19
Overview 20
General Tab_b 21
History Tab_a 23
Purging Scorecard Data 24
Overview 24
General Tab 25
Selecting dimension values 26
KPIs Tab 26
KPI Properties 27
Permissions Tab 29
Saving 29
KPI Scorecard Calculations 30
Event Counts and Weighting 30
Unweighted KPI Calculations 30
Weighted KPI Calculations 31
Configuring Process Scorecards 31
Accessing 32
General tab_a 33
Events tab 33
Process Steps 34
Overall Abandonment Event 35
Step Abandonment Events 36
Overall Failure Event 36
Failure Events 36
Grades tab 37
Permissions tab 38
Saving 38
Creating Events for Business Process Scorecards 38
Process step events 39
Failure step events 39
Abandonment step events 39
Example Scorecards 39
Example Business Process 40
Process Steps 40
Process Web Pages 40
Example 1: Checkout Process Scorecard 41
Example 2: Checkout Process Scorecard with Advanced Abandonment 41
Example 3: New User Registration 42
Example 4: Insurance Policy Purchase 42
KPI Scorecard Example 1: Checkout 43
KPI Scorecard Examples: Retail Shopping Site . . . 43
Events used 43
KPI Scorecard Example 2: Checkout 45
KPI Scorecard Example 3: Site Errors 45
KPI Scorecard Example 4: Spiders 46
KPI Scorecard Example 5: Transaction Failures . . . 46
KPI Scorecard Example 6: Unacceptable Response Time 46
KPI Scorecard Example 7: Multiple Applications . . 46
Scorecards 47
Dashboards 47
Scorecard Aggregation Dates 47
Overview 47
Rolling Back Scorecard Aggregation Dates 48
Verifying Scorecard Data 49
Forcing Scorecard Recalculation Using All Available Data 49

Chapter 4. Using Dashboards 51
Dashboard Options 52
Report Access Permissions 52
Configuring Dashboards 53
Dashboard Report Data 53
Dashboards Provided by Tealeaf 53
Dashboard Tabs and Components 54

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Exporting Dashboards 55

Chapter 5. Configuring Dashboards . . 57
Overview 57
Overview of Configuring Dashboards 57
Configure email address 57
Configuration options 58
Getting Started 58
Creating a Dashboard 59
General Tab 59
Tabs tab 60
Adding and arranging tabs 60
Organizing components in a tab 61
Permissions Tab 62
Components Screen. 63
Adding or Removing Components from a Dashboard. 64
Adding a report component 65
Editing a Component 65
Removing a Component 66
Component Templates. 66
Adding a component 66
Dashboard Component Templates 66
Accessing Dashboard Component Templates . . . 66
Common Dashboard Component Properties . . . 67
Common properties in the Data tab 68
Common properties in the Display tab 68
Dashboard Component Template Types 69
Alerts 69
Basic Components 70
Client Performance Page Detail. 70
Client Performance Summary 71
CX: Active Status 72
CX: Canister Status 74
CX: Database Size 76
CX: DecoupleEx Status 76
CX: HBR Status 77
CX: Storage Status 78
Live Event Counts 79
Performance Reports 80
Report Builder 81
Scorecards: KPI 82
Scorecards: Process 83
Top Movers 84
User Activity Reports 85
Visitor Segment Reports 87
Setting the Default Dashboard 89
Overview 90
General Tab 91
History Tab 93
Managing Report Templates for Dashboards . . . 94

Chapter 6. Importing and Exporting Reports 95
Exporting Report Data. 95
Report Templates 95

Chapter 7. Exporting Report Templates 97
Limitations 97
Recommended Workflow. 97
Export Template Steps. 98

Chapter 8. Importing Report Templates 99
Limitations 99
Import Template Steps. 99

Chapter 9. Enhancements to Top Movers for cxView 101
Features 101
Creating Top Movers 101
Reporting on Top Movers 102

Chapter 10. IBM Tealeaf documentation and help. 103

Notices 105
Trademarks 107
Privacy Policy Considerations 107

cxView User Manual

cxView enables to configuration and use of scorecards and dashboards. Through the Tealeaf® Portal, you can create and edit scorecards that are based on current Tealeaf data. You can also populate them into dashboards that can be scheduled for generation and shared with other Tealeaf users. Use the following links to access sections of the cxView User Manual.

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Chapter 1. Overview of cxView

IBM Tealeaf cxView enhances the IBM Tealeaf cxImpact portal with scorecards and dashboards. These features serve as entry points for drill-down into session and visitor data for further analysis. Scorecards and dashboards can be configured through the Tealeaf Portal.

Note: IBM Tealeaf cxView is a separately licensable component of the IBM Tealeaf CX system. please contact your IBM Tealeaf representative.

Access

Table 1. Access

IBM Tealeaf cxView Component	**Portal menu**	**Documentation**
Scorecards		
Using	**Analyze** > **Scorecards**	Chapter 2, “Using Scorecards,” on page 5
Configuring	**Configure** > **Scorecards**	Chapter 3, “Configuring Scorecards,” on page 19
Dashboards		
Using	**Dashboards** menu	Chapter 4, “Using Dashboards,” on page 51
Configuring	**Configure** > **Dashboards**	Chapter 5, “Configuring Dashboards,” on page 57
Administration		
Users	**Tealeaf** > **Portal Management** > **IBM Tealeaf cxView User Administration**	"cxView User Administration" in the *IBM Tealeaf cxImpact Administration Manual*
Settings	**Tealeaf** > **Portal Management** > **IBM Tealeaf cxView Settings**	"cxView Settings" in the *IBM Tealeaf cxImpact Administration Manual*
Scorecards Settings	**Tealeaf** > **Portal Management** various	“Scorecards” on page 47

Note: To access IBM Tealeaf cxView scorecards and dashboards, you must have the appropriate menu permissions in your user account. For more information, contact your Tealeaf administrator.

Scorecards

KPI Scorecards and Business Process Scorecards can be used to track your website's performance.

You can track the business performance of your website through scorecards. There are two types of scorecards.

- For more information about using scorecards, see Chapter 2, “Using Scorecards,” on page 5.

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1. KPI Scorecards - These scorecards measure key performance indicators and score the health of online business services that are based on visitors' actual experiences. They measure availability of a functional unit to your visitors.
   - Trends can be indicated by using color-coded status indicators and easy-to-understand charts. Changes in success rates or KPIs are measured in both absolute and percentage terms and are illustrated by using an easy-to-read up/down arrow indicator. Metrics can be viewed for the current hour or day or across days, weeks, and months.
   - See “Overview” on page 24.
2. Business Process Scorecards - Scorecards automatically measure and score overall success, abandonment, and failure rates within each step of a business process. This procedure can be implemented for a critical online business process or across entire process. A process scorecard tracks the success or failure of each step in the business process. They can also be configured to detect events that summarily indicate failure or abandonment of the process.
   - For any business process, you can test hypotheses to determine the issues or occurrences that cause changes in success rates. For example, you can test the impact of a usability issue or an error on your overall conversion rate, customer completions, and even top-line revenue.
   - See “Configuring Process Scorecards” on page 31.

For more information about using scorecards, see Chapter 2, “Using Scorecards,” on page 5.
For more information about configuring scorecards in general, see Chapter 3, “Configuring Scorecards,” on page 19.

Dashboards

Use dashboards to view reports of the data that is captured by Tealeaf in a rich graphical layout. They can be easily customized for specific roles and responsibilities to show only the most relevant reports and metrics.

Dashboard reports can include:

1. Scorecards
2. Reports that are provided by Tealeaf
3. Ad hoc reports that you build in the Report Builder. See "Tealeaf Report Builder" in the *IBM Tealeaf Reporting Guide*.

For more information about using dashboards, see Chapter 4, “Using Dashboards,” on page 51
. For more information about configuring dashboards, see Chapter 5, “Configuring Dashboards,” on page 57

Report Scheduling

Snapshot reports of scorecards and dashboards can be distributed through email on demand or scheduled on a daily, weekly, or monthly basis. Emailed snapshots include a link back to the live report for immediate click-through to deeper analysis.

- For more information about scheduling scorecards, see Chapter 3, “Configuring Scorecards,” on page 19.
- For more information about scheduling dashboards, see Chapter 5, “Configuring Dashboards,” on page 57.

Import/Export

You can import and export report templates and other Tealeaf data for use across Tealeaf environments and in other enterprise systems.

See "Importing and Exporting Reports" in the *IBM Tealeaf cxView User Manual*.

- Tealeaf publishes report templates that you can download through Tealeaf. These templates can be imported and customized to meet the requirements of your Tealeaf solution.

Administration

IBM Tealeaf cxView provides user permission controls to manage users and groups, which enables careful control over access to scorecards and dashboards.

- See "cxView User Administration" in the *IBM Tealeaf cxImpact Administration Manual*.

You can configure settings that apply specifically to scorecard and dashboard configuration and data retention.

- See "cxView Settings" in the *IBM Tealeaf cxImpact Administration Manual*.

You can also configure global settings that apply to all Tealeaf scorecards in the system.

- See “Scorecards” on page 47.

cxView Features

For more information about portal features that are enabled with cxView, see "Portal Navigation" in the *IBM Tealeaf cxImpact User Manual*.

Chapter 2. Using Scorecards

Scorecards can be used to monitor site performance that is based on pre-defined performance metrics. You can use scorecards to measure specific Tealeaf events, visitor conversion rates, and other key performance indicators.

- You can also apply dimensions or dimensional values as filters to your scorecard data. Scorecards with dimensional filters include only the data where the dimensional values are also present.

  Note: Use and configuration of scorecards requires the IBM Tealeaf cxView license. For more information, contact your Tealeaf administrator.
- To access scorecards, select **Analyze** > **Scorecards** in the Tealeaf Portal.
- For more information about creating scorecards, see Chapter 3, "Configuring Scorecards," on page 19.

Scorecard Terminology

Before you begin, familiarize yourself with the following scorecard terms.

General Scorecard Terms

Term **Definition**

Business Process
A coherent unit of a workflow that is meaningful in a business sense. Examples include placing an order for products at an online shopping site or registering for a new user account at an online banking site.

Availability
Measure of the percentage of all occurrences of a functional unit usage on the website when it responded normally. Timeouts, missing pages, and other errors render a web application less than 100 percent available to its users.

Focus Period
The time period that is the principal focus of the scorecard currently being viewed.

Comparison Period
The time period that provides the baseline scorecard to which the focus period's scorecard is compared.

- If the comparison feature is enabled, the scorecard for the focus period is compared to the scorecard generated from data for the comparison period.

Positive Comparison
For the purposes of rating and grading, positive comparison means that higher numerical percentage values for specific quantity result in a higher scorecard letter grade.

Negative Comparison
For the purposes of rating and grading, negative comparison means that lower numerical percentage values are for specific quantity result in a

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higher scorecard letter grade. This comparison is useful when the rated indicator is undesirable, such as the frequency of occurrence of an HTTP error status code.

Scorecard types

IBM Tealeaf cxView provides two different types of scorecards:

Table 2. Scorecard types

Type	Description	Terminology	Configuration
Key Performance Indicators (KPI) Scorecards	These scorecards measure key performance indicators and score the health of online business services that are based on visitors' actual experiences. They measure availability of a functional unit to your visitors.	KPI Scorecard Terms	"Overview" on page 24
Process Scorecards	These scorecards automatically measure and score overall success, abandonment, and failure rates within each step of a critical online business process or across the entire process.	Business Process Scorecard Terms	"Configuring Process Scorecards" on page 31

Business Process Scorecard Terms

These terms pertain to business process scorecards specifically:

Term Definition

Process Steps
The sequence of steps that is defining the required flow through a business process. For example, the process of placing an order for products includes steps to specify the kinds and quantities of products to order. It also includes customer's identification and shipping address, and payment method information.

Abandon Step
An event or a set of events that represents abandonment of a business process by the visitor. For example, a request from the visitor's web browser for the Order Canceled page signifies the abandonment of an order placement process.

Failure Step
An event or set of events that represent the failure of a business process. For example, the appearance of an HTTP 500 (internal server error) page signifies failure of a business process.

KPI Scorecard Terms

These terms pertain to key performance indicator (KPI) scorecards specifically:

Term Definition

Activity Indicator
An indicator of the general activity or traffic on a web application regardless of success, failure, or availability. It can be the total number of web application sessions, hits, or the count of a particular Canister event. It is used as the denominator in KPI percentage rating calculations.

Availability Indicator
An event that indicates either that the system is available or unavailable. The count of HTTP responses whose HTTP status code is 200 (success) indicates availability, while HTTP 500 (internal server error) is an indicator of non-availability.

Scorecard Report Data

At regular intervals, the Tealeaf data collector polls each canister for session data to aggregate and store in the appropriate databases. When a scorecard or dashboard is queried, this aggregated data is used to populate the report.

- Typically, the Data Collector polls at 5-minute intervals. For more information about settings, see "CX Settings" in the *IBM Tealeaf cxImpact Administration Manual*.

The Data Collector requires access to all Canisters in the Tealeaf environment, and all Canisters must be receiving data. If an active Canister is not receiving data or cannot be reached because of network interruption, the Data Collector fails the data collection process. It happens as running a partial collection corrupts the reports that use it.

Note: All Tealeaf Canisters must be receiving session data and must be accessible over the network. If any canister is unavailable or not receiving data, report data collection is suspended. Scorecards and dashboards are not updated with new data until the problem is fixed. When collection resumes, reports are not updated until all spooled canister data is collected, aggregated, and stored in the database.

- Hits are evaluated against the set of current set of events at the time of evaluation. If hits are spooled or otherwise not processed immediately, there can be effects in reporting if changes are made to event-related objects in the interim. For more information, "Tealeaf Event Manager" in the *IBM Tealeaf Event Manager Manual*.
- For more information about data collection, see "Data Aggregation and Retention" in the *IBM Tealeaf cxImpact Administration Manual*.
- For more information about managing Canisters, see "Managing Tealeaf Servers" in the *IBM Tealeaf cxImpact Administration Manual*.

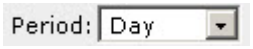
Displaying Scorecards

To display existing scorecards, you must select the scorecard, the period, and the focus period.

Scorecard toolbar

Figure 1. Scorecard toolbar

Table 3. Scorecard toolbar.

Icon	Command	Description
	Date Selector	Select a current focus date range and optionally a comparison date range for the scorecard.
	Open	Open a selected scorecard.
	Schedule Snapshot	Schedule a snapshot of the scorecard for delivery to selected recipients through email.
	Export Report	Export the currently configured scorecard to Excel or PDF.
	Add to Dashboard	Add the current scorecard to a selected dashboard tab. See "Tealeaf Report Builder" in the *IBM Tealeaf Reporting Guide*.
	Period	Select the period for the scorecard, which determines what data period to use for the aggregated data: counts in daily, weekly, monthly, or quarterly periods. Based on this selection, the calendar selects ranges of the appropriate size.

Opening a Scorecard

Complete the following steps to open a scorecard.

- Scorecards can be configured through the **Portal** menu and made available to other Tealeaf users for selection. See Chapter 3, “Configuring Scorecards,” on page 19.

1. To begin, select **Analyze** > **Scorecards** from the Tealeaf Portal menu.
2. In the toolbar, click the **(Open**) icon.
3. The Scorecard Selector is displayed:

Figure 2. Scorecard Selector

4. Browse the list of available scorecards.
   - To filter the list, enter text in the textbox and press **Return**.
   - For the filter string, do not include wildcards. For example, entering `check` can return `Calculated checkout`, `checkout`, and `Checkout Metrics`, which can be in different categories.
   - To display the scorecards by their scorecard type, select the **View by Labels** check box.

     Note: You can view all scorecards that you create or that are shared to you. If you cannot find a shared scorecard, contact your Tealeaf administrator or the creator of the scorecard.
5. To display the scorecard, click **Select**. The scorecard is displayed.
6. To change the focus period and the comparison period for the scorecard, click the date in the toolbar. The **Date Selector**is displayed.
   You can use the controls in the toolbar to change the scorecard, as needed.

- For more information about displaying key performance indicator scorecards, see "Overview of KPI Scorecards" on page 13.
- For more information about displaying business process scorecards, see "Overview of Process Scorecards" on page 15.
- Displayed scorecards can be exported to Excel, HTML, and PDF formats, and also sent to the printer. See "Exporting Scorecards" on page 12.

Date Selector

By default, scorecards are configured to display report data from the current date. Configure report to display data from a period of days, compare the data from the focus period to a comparable period, or both.

Configuring scorecard period

You can configure the scorecard to aggregate data based on the selected period. Select one of the following options from the **Period** drop-down

- Day
- Week - business week
- Month
- Quarter

This selection defines the period to use for the aggregated data, which forces the calendar to select ranges of the appropriate size. The scorecard is updated to display report data for the relevant period.

For reporting purposes, the beginning of the week is defined as Sunday.

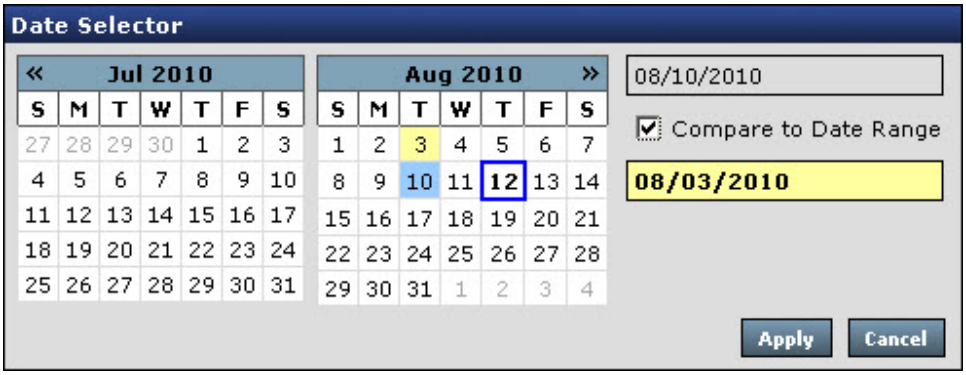
- The beginning of each quarter is January, April, July, and October.

Configuring for different dates and comparison periods

To change the base date for the focus period and optionally to configure a comparison period, complete the following steps.

- When configured, a comparison period scorecard is displayed side-by-side on-screen and in exported reports with the focus period scorecard.

1. To change the focus period, click the date in the toolbar. The **Date Selector** is displayed:



2. In the Date Selector, select the first day of the time period on which to focus.
   - You can use << and >> to choose time periods relative to the current date.
   - If you have select a period other than Day, a range of dates around the selected date is automatically selected for you.
3. Comparison Period: Optionally, you can create a side-by-side comparison of the focus period with another period in the scorecard. Click the **Compare to Date Range** check box.
   a. A yellow range box is displayed. Select the start date of the comparison period. Press SHIFT and select the end date of the comparison period.
4. To generate the scorecard for the selected focus period and comparison period, click **Apply**.

Scheduling Scorecard Snapshots

You can schedule the snapshot and delivery of scorecards. Scorecards snapshots are delivered in PDF, HTML, or Excel format to specified email addresses on a daily, weekly, or monthly basis.

- For more information about configuring access permissions, see "Report Access Permissions" in the *IBM Tealeaf cxImpact Administration Manual*.

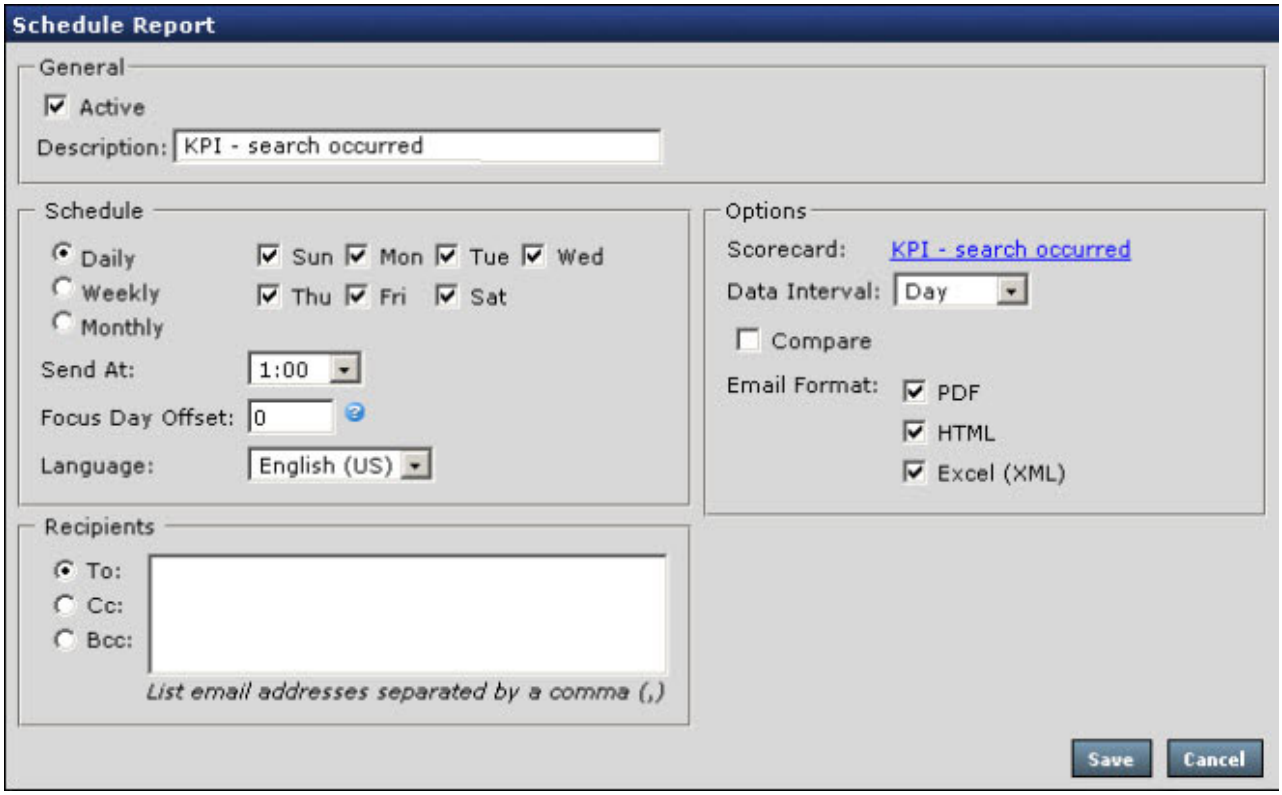


Figure 3. Scheduling Scorecard Snapshots

Note: To configure and deliver report snapshots from the portal, you must enter a valid email address for your user account. See "My Settings" in the *IBM Tealeaf cxImpact User Manual*.

Properties

Description

Active

Click the check box to enable the scorecard schedule.

Description

This description is displayed in the portal.

Schedule

Schedule the scorecard by type:

- **Daily-**Select the days of the week when you want to run the scorecard.
- **Weekly -**Select the single day of the week when you want to run the scorecard.
- **Monthly -**Click to set the day of the month when you want to run the scorecard.

Send At

Select the time when you want to run and deliver scorecard.

- Time is based on the Tealeaf system time zone. See "Configuring the System Timezone" in the *IBM Tealeaf CX Configuration Manual*.

Focus Day Offset

Optionally, you can configure the number of days before the date of execution that you would like to define as "today" in the scorecard. For

example, you might configure a scorecard to be run on Tuesday morning to delivers Monday's data to users. In this case, you would set the offset value to 1.

Language
Select the language to use in the scorecard from the **Language** drop-down..

Recipients
Enter a comma-separated list of email addresses or aliases to whom to send the scorecard.

Scorecard
Click the link to select the scorecard to send. Select the scorecard and click **Select**.

Data Interval
Select the scorecard date interval. The period is defined relative to the date of the scorecard execution, factoring the `Focus Date Offset`. For example, a scorecard that run on Sunday evening with an offset of three days with a Data Interval of `Day` delivers scorecard data from Thursday.

- To generate a scorecard that includes comparison data from the preceding **Data Interval**, select the **Compare**check box.

Email Format
Select the format of the email scorecard:

- **PDF** - Scorecard is attached to the email as a PDF file.
- **HTML** - Scorecard is rendered as an HTML page.
- **Excel (XML)** - Scorecard is attached to the email as an XML file that is readable in Excel.

Exporting Scorecards

You can export scorecards into three different formats: Excel, PDF and email.

To export a displayed scorecard, click the **Export** ( ) in the toolbar. Select the type of export:

- Excel - Export the report data in XML format for use in Microsoft Excel.
- PDF - Generate the report in PDF format.
- Email - Mail the report to selected email addresses:

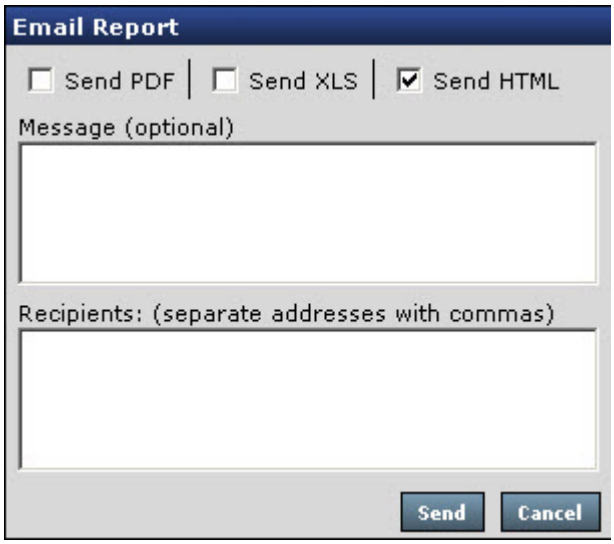


Figure 4. Email Scorecard

1. Choose the format for the delivered report. You can select more than one:
   - **Send PDF**
   - **Send XLS**
   - **Send HTML**
2. In the **Message** textbox, you can include an optional message that is inserted as the body of the email.
3. In the **Recipients**textbox, enter a comma-separated list of recipient email addresses.
4. To email the report, click **Send**.
   - To cancel, click **Cancel**.

Overview of KPI Scorecards

KPI scorecards typically show how values or ratios are comparing to your site's predefined scoring model. For example, values such as the number of page views or ratios such as conversion rates can be represented in chart form. Ratios such as conversion rates across time can be displayed in pie charts, bar charts, and other representations.

KPI Summary

The summary for a KPI scorecard displays a grade distribution for the scorecard's KPIs for the selected period. Based on the configuration, the grades indicate whether the KPIs are in a good or bad state. The pie charts for the Focus period (and the Comparison period, if any) show the breakdown of grades by KPI group.

Each slice of the pie corresponds to one letter grade. The proportion of each letter grade as a fraction of the number of distinct grades that received is shown. For example, if you have three KPI groups and two are receiving an A grade while the third group is receiving a C. The pie chart indicates that 66.67% of the KPI groups are getting an A and 33.33% are receiving a C.

Details

For each KPI group, you can review the following quantities for the Focus period and any available Comparison period, including the rate of change.

Column
Description

KPI Name of the KPI
- You can click links in the KPI column of the table go to the detail page for each KPI group.

Goal The optimal rate for the group.

Grade Letter grade: A, B, C, D, or F.

Rating Numerical ratio which is underlying the letter grade:
`KPI indicator count divided by activity indicator count`

Change If there is a comparison period that is shown, the change between the comparison period and the focus period is shown.
- A green upward-pointing or red downward-pointing arrow is displayed corresponding to positive or negative change.
- The numerical difference between the rating of the focus period and that of the comparison period is also displayed.

KPI Details

Click a **KPI**link to open the KPI Detailwindow, which provides a breakdown of each event in the KPI and the base activity count.
- You can select an event count to display the Event Chart for period that is showing a daily or hourly breakdown of the event.
- If compared to another period, the comparison counts and the appropriate delta markers (Up and Down Arrows) are displayed.

The summary row is calculated based on the Summary Calculation setting.

Metrics

Field **Description**

Rating The KPI level during the time period that is reported.

Goal The required KPI level that is defined in the scorecard. A Change value is not shown for this quantity because it is a property of the scorecard, not a value that is calculated from collected data.

Grade The letter grade corresponding to the Rating value.

Total Activity

The total count of the scorecard's KPI events for the focus period.

If a comparison period is enabled, the count for the comparison period is also shown. It also shows change in the count from the comparison period to the focus period.

Indicator

For each KPI indicator in the scorecard, this table shows the following quantities:

Column

Description

Event Count

The absolute count of occurrences of the indicator event.

- Click this number to search and retrieve the relevant sessions. See "Searching Session Data" in the *IBM Tealeaf cxImpact User Manual*.

% Activity

The percentage of the count of the Base Activity event for the KPI.

Change

If comparison period is shown, the change between the comparison period and the focus period is shown. A green upward-pointing or red downward-pointing arrow is displayed corresponding to positive or negative change. The numerical difference between the rating of the focus period and that of the comparison period is also displayed.

Multiple KPI Scorecards

Multiple scorecards can be defined, and each can be composed of multiple user-defined components and component types. As seen in the example below, a distribution of scores can be shown with a pie chart.

Figure 5. KPI Scorecard

A trend diagram and today/yesterday comparisons of KPIs can be used. KPIs can be built upon other KPIs, providing enhanced analysis of specific aspects of your site.

Overview of Process Scorecards

A process scorecard is based on defined steps for processes on your site. A typical example is the checkout process for a retail site, in which each step is monitored by a pre-defined Tealeaf event. For each step, absolute numbers of visitors are counted, and a conversion rate is calculated. A grade can be associated with the conversion rate.

The Process scorecard summary displays the counts for the selected process: Starts, completions, abandonments, and failures.

If abandonment and failure events are configured, the appropriate percentages are displayed on the Success Rate Indicators graph.

The grades for each process are displayed with the associated rating. The counts for each individual step are displayed, along with the conversion rate from the previous step.

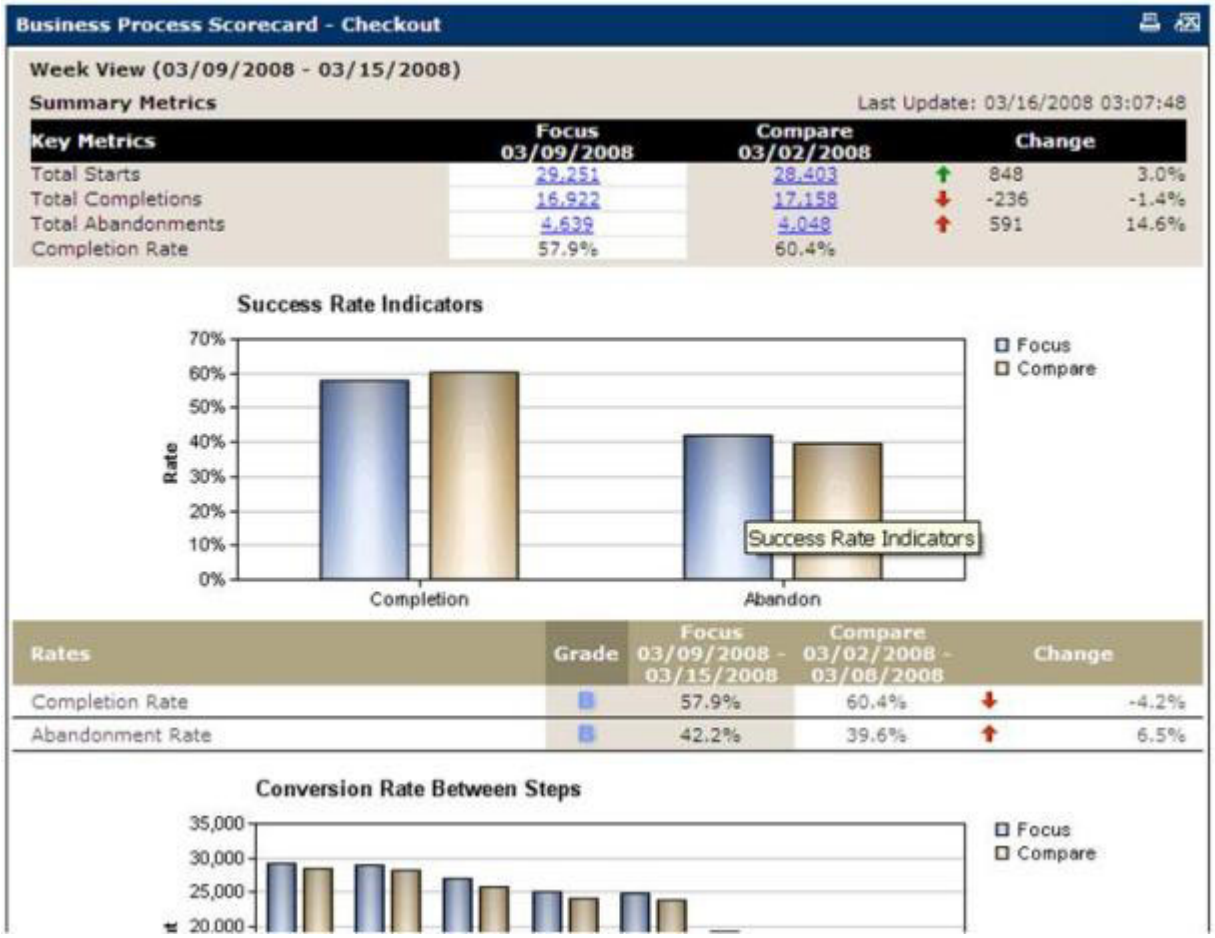


Figure 6. Business Process Scorecard

Key Metrics

Key Metrics shows the value of each of the following business process statistics during the focus period and any available comparison period.

- The change in values from the comparison period to the focus period is displayed, both as an absolute count and as a percentage.
- Click links in the table to go to the event chart for the event that defines each step.

Field Description

Total Starts
Total starts of the business process.

Total Completions
Total completions of the business process.

Total Abandonments
Total abandonments of the business process.

Total Failures
Total failures of the business process.

Completion Rate
Ratio of Total Completions to Total Starts.

Change
If there is a comparison period, the change between the comparison period and the focus period is shown. A green upward-pointing or red downward-pointing arrow is displayed corresponding to positive or negative change. The numerical difference between the rating of the focus period and that of the comparison period is also displayed.

Success Rate Indicators - This column chart and table indicate **Completion Rate**, **Abandonment Rate**, and**Failure Rate** as percentages of the **Total Starts** for the focus period (and the comparison period, if any).

Rates

Field	Description
Grade	Letter grades corresponding to the numerical rates. Focus: Shows the success rate indicator during the focus period.
Focus	The focus period.
Compare	Shows the success rate indicator during the comparison period, if comparison is enabled.
Change	If comparison period is shown, the change between the comparison period and the focus period is shown. A green upward-pointing or red downward-pointing arrow is displayed corresponding to positive or negative change. The numerical difference between the rating of the focus period and that of the comparison period is also displayed.

Conversion Count Between Steps - Shows a column chart and table for the conversion counts between adjacent steps in the business process. It shows the conversion count during the focus period (and the comparison period, if any). Click links in the table to go to the event chart for the event that defines each step. Conversion Rate Between Steps - Shows a column chart and table for the conversion rates between adjacent steps in the business process. It shows the conversion rate during the focus period (and the comparison period, if any).

Process Step

In the Process Step report, you can examine the session count breakdowns for each step of the process. These counts indicate the number of occurrences for each step of the process and the conversion rate from the previous step to the current one.

Field	Description
Count	Raw count of occurrences of each step of the business process. • Drilldown links are provided for these counts.

Conv Conversion rate is the count of occurrences of each step, which is divided by the count of occurrences of the immediately preceding step. Given this definition, it is impossible to define the conversion rate of the first step in a process.

Change If comparison period is shown, the change between the comparison period and the focus period is shown.

A green upward-pointing or red downward-pointing arrow is displayed corresponding to positive or negative change. The numerical difference between the occurrence count of each process step in the focus period and comparison period is displayed as an absolute number and percentage.

Detail drilldown

You can drill down into the individual step counts for a process to a detail chart for that event over the mentioned period. For a single day, an hourly breakdown is displayed, and a daily breakdown is shown for multi-day periods.

Process Step Dropoff

In the Process Step Dropoff report, you can examine the number of sessions that dropped-off of the process between individual steps.

Field **Description**

Count Count of sessions that includes a step in the process (for example, Step 1) yet drop off and do not include the subsequent step (Step 2).

- Drilldown links are provided for these counts.

Drop % Percentage of the sessions in the previous step that were dropped in the current step.

Count drilldown

In the Process Step Dropoff report, you can drilldown into individual sessions that contain a step in the process but not the subsequent one. These drilldown links examine abandonment between specific steps.

Chapter 3. Configuring Scorecards

You can create your own custom scorecards through the Tealeaf Portal.

- To configure scorecards, select **Configure** > **Scorecards** in the Portal menu. The list of Process Scorecards is displayed.

  Note: Configuring scorecards requires the appropriate permissions in your user account. For more information, contact your Tealeaf administrator.

Figure 7. Configuring Scorecards page

- Active scorecards are indicated with a check box in the **Active** column.
- The cxResults Compatible column includes a check box if all of the events in the scorecard are configured to be included in IBM Tealeaf cxResults.

  Note: Scorecards that are not compatible with IBM Tealeaf cxResults cannot be loaded into for Visitor analysis. See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.

To begin creating or editing a scorecard, select the type of scorecard in the left panel.

Category
: **Description**

Process Scorecards
: Process scorecards are used to track business process in your web application. See “Configuring Process Scorecards” on page 31.

KPI Scorecards
: Key Performance Indicator scorecards identify and measure performance metrics that are critical to your web operations. For more information, see “Overview” on page 24.

Scorecard Schedules
: You can configure execution of scorecards on a daily, weekly, monthly basis for a configured reporting period and deliver them through email to selected users. See “Overview” on page 20.

Aggregation Dates
: You can review and reset the last date of data to process for the scorecards. When this button is clicked, the last process date is displayed in the right panel. You can change the date, if you want to reset or reprocess scorecard data. See “Scorecard Aggregation Dates” on page 47.

Purge Data
: Purge scorecard data for selected scorecards. See “Purging Scorecard Data” on page 24.

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Report Templates

You can export report templates for use in other Tealeaf installations and import templates for use in your current system. See "Importing and Exporting Reports" in the *IBM Tealeaf cxView User Manual*.

- Additional templates can be downloaded from Tealeaf Online Help. For more information, "Importing and Exporting Reports" in the *IBM Tealeaf cxView User Manual*.

After you select a category, the list of available scorecards of the selected type is displayed in the right panel. Available commands:

- To edit an existing one, select it in the right panel and click the **Edit (** **)**icon.
- To create a scorecard, click the **New (** **)** icon.
- To delete a scorecard, select it and click **Delete (** **)** icon.

For more information about scorecards, see *IBM Tealeaf cxImpact Administration Guide*.

Overview

After you create scorecards, you can configure the execution of snapshots of scorecards on a daily, weekly, or monthly basis for a specified reporting period. These reports are delivered to specified email addresses or aliases at the time of execution.

Note: To email report snapshots, you must configure an email address in your user account. It is recommended that you do not create snapshot schedules from a Tealeaf administration account.

- See "My Settings" in the *IBM Tealeaf cxImpact User Manual*.

Note: Non-administrator users can configure report schedules only for reports that are owned by the user. The Tealeaf admin can see and configure all schedules.

- To configure scorecard schedules, click **Scorecard Schedules** in the left pane.

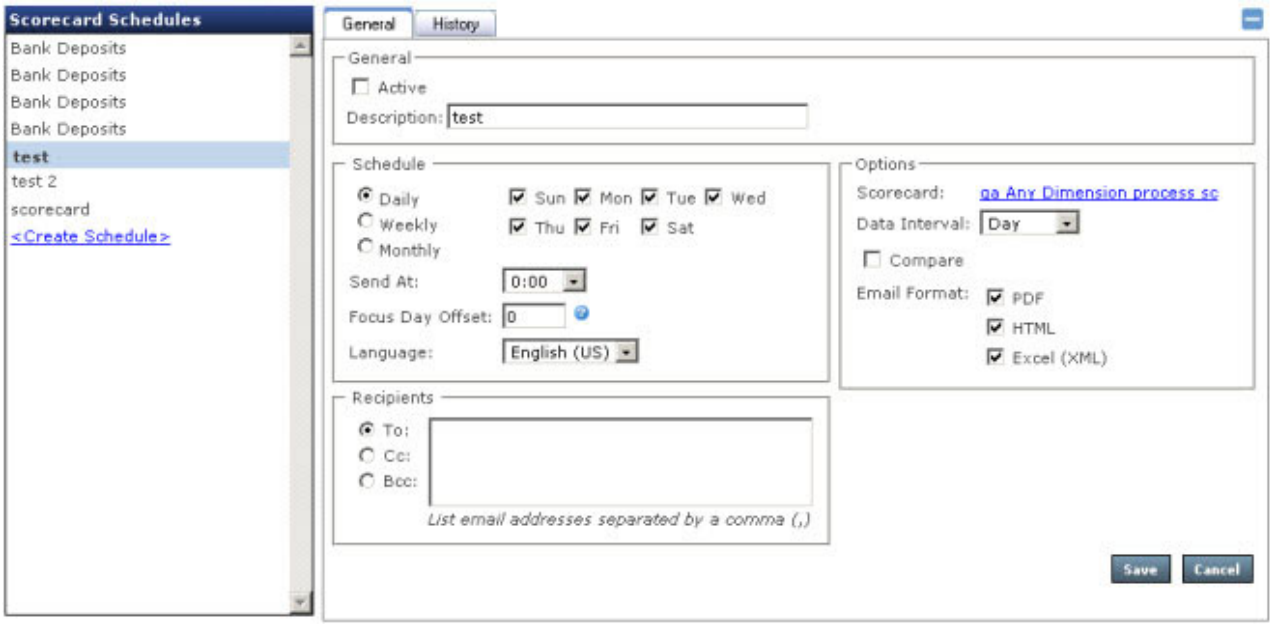

Figure 8. Scorecard Schedules

- To configure a new scorecard schedule, click **<Create Schedule**.
- To edit an existing schedule, select it in the middle pane. The schedule is displayed in the **General** tab.
- To save the current schedule, click **Save**.
  - To cancel changes to the currently selected schedule, click **Cancel**.
- To remove a schedule, select it and then click the **Minus (**) in the upper-right corner.

General Tab_b

To configure a new or existing schedule, specify the properties in the **General** tab.

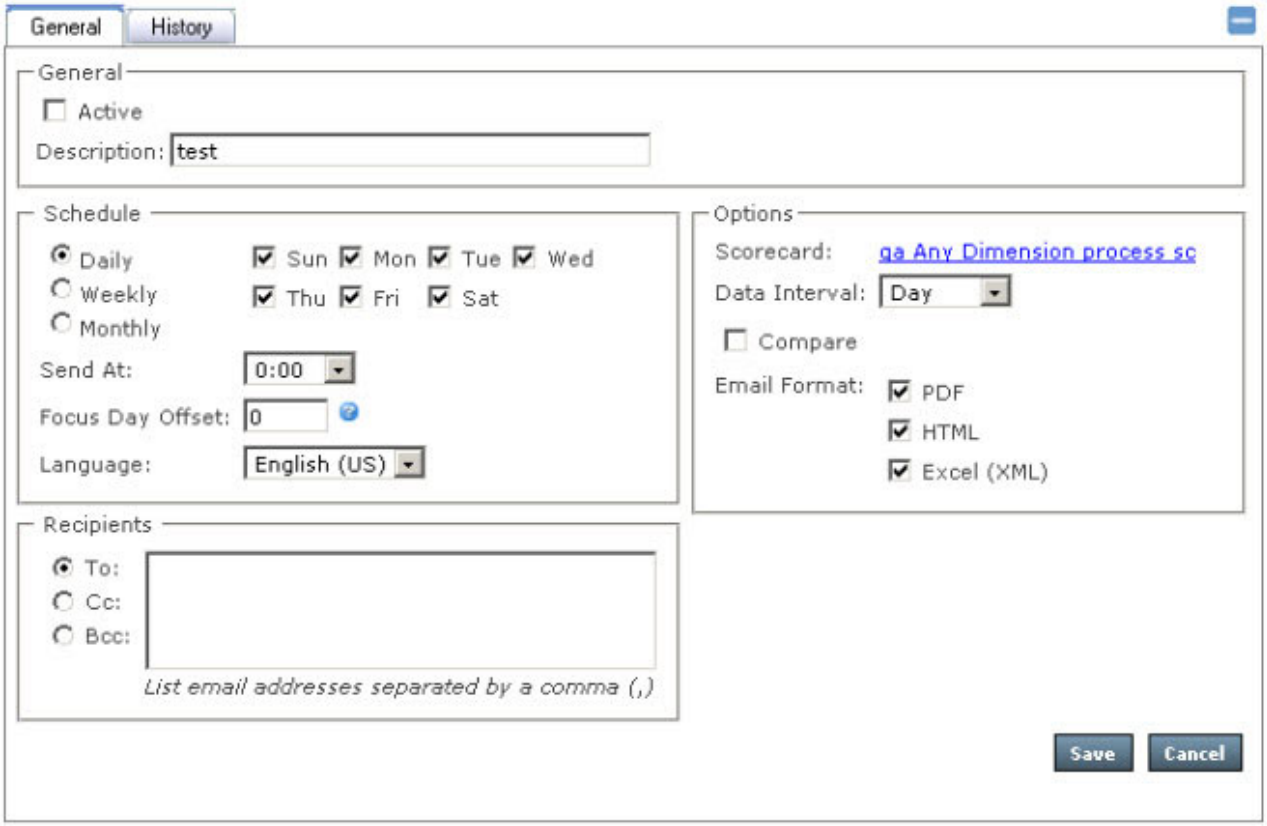

Figure 9. Scorecard Schedules - General Tab

Properties

Description

Active

Click the check box to enable the scorecard schedule.

Description

This description is displayed in the Portal.

Schedule

Schedule the scorecard by type:

- **Daily**- Select the days of the week when you want to run a scorecard.
- **Weekly**- Select the single day of the week when you want to run a scorecard.
- **Monthly** - From the drop-down, select the day of the month when you want to run a scorecard.

Send At

Select the time when you want to run and deliver a scorecard.

- Time is based on the Tealeaf system time zone. See "Configuring the System Timezone" in the *IBM Tealeaf CX Configuration Manual*.

Focus Day Offset

Optionally, you can configure the number of days before the date of execution that you would like to define as "today" in the scorecard. For example, you might configure a scorecard to be run Tuesday morning to delivers Monday's data to users. In this case, you would set the offset value to 1.

Language
Select the language to use in the scorecard from the drop-down.

Recipients
Enter a comma-separated list of email addresses or aliases to whom to send the scorecard.

Scorecard
Click the link to select the scorecard to send. Select the scorecard and click **Select**.

Data Interval
Select the scorecard with reporting period from the drop-down list. The period is defined relative to the date of the scorecard execution, factoring the `Focus Date Offset`. For example, a scorecard that runs on Sunday evening with an offset of three days with a Date Period of `Week` delivers scorecard data from the previous Thursday back to the Thursday before it.

Compare
Click this check box to include the preceding Data Interval in the report.

Email Format
Select the format in which to send the dashboard: `PDF`, `HTML`, or Excel-readable XML (`Excel (XML)`).

History Tab_a

In the **History** tab, you can review the history of scheduled scorecard executions.

Figure 10. Scorecard Schedules - History Tab

Column
Description

Created At
Time stamp for when the schedule was created.

Scheduled At
Time stamp for next execution of the schedule.

Log Level
Success or failure of the scheduled report.

Message
Detail message on status of report execution.

Purging Scorecard Data

If needed, you can purge data for individual scorecards. For example, if your scorecard definition is changed significantly, the event-related data in it can no longer be valid.

Note: Purging scorecard data permanently deletes data specific to the selected scorecard. Scorecard data is stored separately from base IBM Tealeaf cxImpact data, which is unaffected by this operation.

Note: If a fact is used by multiple scorecards, its count data is not purged. If the fact is used only for the selected scorecard, all data that is associated with it is removed.

You can repopulate the scorecard by purging the scorecard data. Set the Aggregation Date to an earlier date after you purge the data. This action forces the reaggregation of all scorecard data that begins with that date. See "Scorecard Aggregation Dates" on page 47.

- If you do not repopulate the scorecard, data is accumulated in the scorecard from the time when its data was purged onward.

To purge data:

1. In the Scorecard Configuration page, click the **Data Management** link.
2. Click **Purge Data**.
3. Click **<Select a Scorecard**.
4. In the Scorecard Selector, choose a scorecard whose data you want to purge. Click **Select**.
5. To permanently delete the data for the selected scorecard, click **Purge Data**.
   - To cancel without deleting any data, click **Cancel**.
6. Confirm the deletion. The data is purged.

Overview

KPI scorecards are used to measure the relationship between event counts and a baseline count. These counts include the number of sessions, number of page views, or another event count. Each KPI scorecard can have any number of individual defined KPIs, each containing a list of events to report, their grades, and the base count.

Figure 11. KPI Scorecard

To access KPI scorecards:

1. In the Tealeaf Portal menu, select **Configure** > **Scorecards**.
2. In the Configuration pane, click **KPI Scorecards**. The list of available KPI scorecards is displayed. Available commands:

Command	Description
	To edit an existing scorecard, select it and click the **Edit** at the top of the pane.
	To create a new one, click the **New**.
	To delete a scorecard, select it and click the **Delete**.

Before you add or edit a KPI scorecard, configure it through the following tabs:

Tab	Description
General	The general information for the scorecard.
KPIs	Specify the key performance indicators to use in the scorecard.
Permissions	The User Group-level permissions for viewing the selected scorecard within the portal.

For more information about configuring schedules for scorecards, see Chapter 3, “Configuring Scorecards,” on page 19.

- For more information about configuring access permissions for reports, see "Report Access Permissions" in the *IBM Tealeaf cxImpact Administration Manual*.

General Tab

Figure 12. KPI Scorecard - General tab

The **General** tab for KPI scorecards defines the title of the scorecard. It also applies the specific report group and dimension value filtering, and activate the scorecard.

Note: If a scorecard is not configured to be active, it is not processed, and the report contains no data.

Selecting dimension values

By default, a newly created scorecard is assigned to the `No Dimension Report Group` report group. In the General tab, this assignment is indicated by the `No Dimension Report Group` entry. If the scorecard is configured to use the `No Dimension Report Group` report group, then no additional dimension filtration can be applied on the report, since all events share this report group by default.

Note: Scorecards that use a dimension to filter data cannot be used in IBM Tealeaf cxResults.

Note: If you select a different report group:

- All events that are used in the scorecard must include this report group.
- Any events that do not include this report group yet are already part of the scorecard are automatically removed from the scorecard.

Optionally, you can select a single whitelisted dimension value to display in the scorecard. Complete the following steps to select a whitelist value for use in your KPI scorecard or Process scorecard.

Note: Selecting a dimension group without a corresponding dimension value does not have any filtering effect on the counts that are displayed in the report. It effects report counts if a specific fact (event + report group) in the scorecard are disabled during the lifetime of the scorecard.

1. Click the **General** tab.
2. Click **No Dimension Report Group** next to Report Group.
3. Click **OK** to confirm removal of incompatible events after the selection.
4. In the Report Group Selector, select the report group that is containing the required dimension. Click **Select**.
5. The Report Group entry is updated. To select the dimension, click **<Any Dimension** next to Dimension.
6. In the Dimension Selector, select the dimension to include in the scorecard. Click **Select**.
7. In the Dimension Value Selector, you can select a whitelisted value of the selected dimension with which you want to filter the scorecard. Click **Select**.
   - If no dimension values are available for selection, no dimension value filtering is performed.
   - You cannot select non-whitelisted values to display in a scorecard. It means that it is important to verify that you select appropriate values to record in the scorecard. Whenever whitelisted values are encountered, they are recorded in the scorecard.

     Note: If a report template is exported for use in another system, only whitelisted values are included in the export. Blacklisted values and other values are excluded in the export to limit its size. See "Importing and Exporting Reports" in the *IBM Tealeaf cxView User Manual*.

KPIs Tab

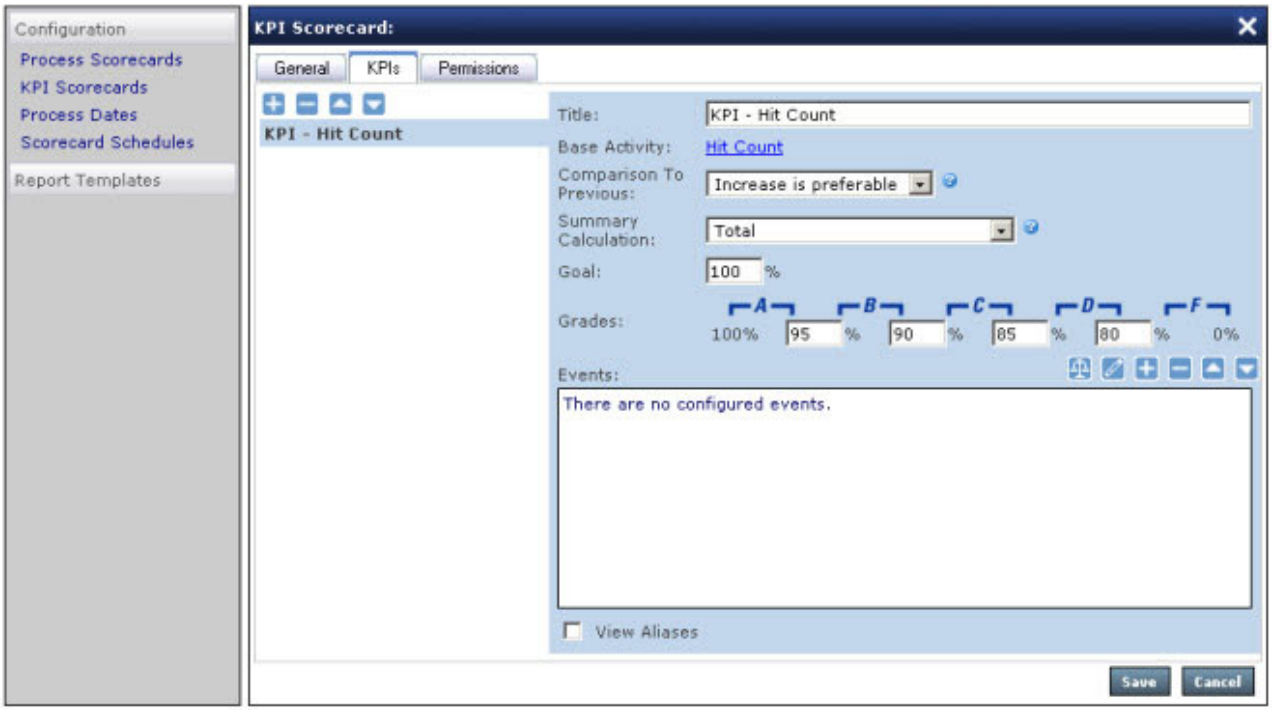

Figure 13. KPI Scorecard - KPIs tab

Each key performance indicator is a group of related events, which are displayed together relative to the base activity for the KPI. A KPI contains:

- One base activity event
- One or more events that are measured against the base activity to determine performance

KPI scorecards can contain any number of KPIs. KPIs are graded according to the sum of the KPI events that are divided by the base activity count.

KPIs are created, deleted, and reordered by using the icons above the list of KPIs.

- To edit a KPI, select it in the list. Its properties are displayed.

Icon	Description
	Add a KPI.
	Delete the selected KPI
	Move the selected KPI higher in the list. Event counts are summed regardless of their order.
	Move the selected KPI lower in the list. Event counts are summed regardless of their order.

KPI Properties

Each KPI has the following properties:

Property	Description
`Title`	The title of the KPI

Base Activity
The denominator for the KPI events. This number is compared to the values of the KPI events. It must have a count greater than or equal to the sum of the KPI event counts. The rating for the KPI is the sum of the KPIs event counts divided by the base activity count:

- `Event` - The event to count as the denominator for the KPI.
- To stop your event activity of session or pages counts, use the Session Count or Hit Count event as the base activity in the denominator. These events must be configured in the General tab to share report group same as the scorecard itself.
- For more information about configuring events, see "TEM Events Tab" in the *IBM Tealeaf Event Manager Manual*.

Comparison To Previous
This property identifies how to mark rating changes when you compare KPI scorecards for different time periods:

- `Increase is preferable` - If the current rating is higher than the previous rating, it is marked with a green Up Arrow. Decreases are marked with a red Down Arrow. Desirable events such as purchase events must be marked in this manner.
- `Decrease is preferable` - If the current rating is lower than the previous rating, it is marked with a green Down Arrow. Increases are marked with a red Up Arrow. Undesirable events such as abandonment events must be marked in this manner.

Summary Calculation
This property defines how the KPI events are summarized when you view KPI details:

- `Total` - The sum of the event percentages is displayed
- `Average (including zero values)` - The average of the event percentages are displayed, including counts of 0.
- `Average (excluding zero values)` - The average of the event percentages are displayed, omitting counts of 0.

Goal The visible goal for the KPI has no effect on the rating and is used to compare against the actual rating on the scorecard report.

Grades KPI grades are used to mark the overall completion rate of a process. The percentages are used to compare against the rating for the KPI. If increases are preferable for the KPI, the grades range from 100% to 0%; if negative, they range from 0% to 100%. The grades that themselves are displayed on the scorecard report.

- To toggle the display of aliases in the scorecard configuration page, click the View Aliases check box. This setting is not saved with the scorecard itself.

KPI events

In the **Events** pane, you can select the events to include as the numerators for the KPI in the scorecard.

- The listed events can be assigned weights in the overall scoring calculation.
- For more information about how KPIs are calculated, see “KPI Scorecard Calculations” on page 30.

Select KPI events so that related events are joined in a KPI, especially in relation to the Comparison To Previous setting.

Note: Only events in the KPI can be included once in the **General** tab for each per KPI. The events must include the same report group as the scorecard itself.

KPI Weights

KPI events can be weighted to adjust for the importance of different events within a single KPI.

- To assign weights, click the Weight ( ) icon.

For example, consider a KPI had three errors as events (Error 1, Error 2 and Error 3). You can weight Error 1 twice as much as the others by assigning it a weight of 50%. The other two weights of 25% until the KPI was configured to be weighted. If the KPI is weighted, the assigned weights are displayed in the list of events.

Note: The sum of all weights for the KPI must equal `100`.

See "KPI Scorecard Calculations" on page 30.

Permissions Tab

Scorecard permissions are used to restrict the viewing of a particular scorecard to specific Portal user groups. Selected user groups can view the scorecard on the Scorecard report page.

Figure 14. KPI Scorecard - Permissions tab

Note: Settings that are defined in this tab affect only the viewing of the scorecard and do not affect permissions for scorecard administration. Any user or group that can access the Configuring Scorecards page can configure any displayed scorecard. See "cxView Settings" in the *IBM Tealeaf cxImpact Administration Manual*.

Saving

You can save your scorecard at any time. Click **Save**.

- To cancel the scorecard creation process, click **Cancel**.

Note: Canceling stops the scorecard creation process without saving changes to other tabs. All unsaved changes are lost.

KPI Scorecard Calculations

This section provides an example of how KPI calculations are formulated. For this KPI, suppose that you have a set of five events. The Base Activity parameter is set to `Event`, and for the time period, suppose that the count of events is `50`.

Grade assignments are straightforward, with the following grade assignments that are targeting a goal of `100`.

Table 4. KPI Scorecard Calculations

A	B	C	D	F
90%	80%	70%	60%	50%

Event Counts and Weighting

In the following table, you can see how event counts and weights are related. For our example of five events, you can see the Event Counts for each event for the time period.

If no weights are assigned for the selected events, the unweighted percentage is calculated by the following formula for each event:

```
1 / (Number of events)
```

In our example, this calculation is 1/5 or 20% for each type of event.

In the Weighted column , example weights are applied for each event. These weights are as part of creating the KPI scorecard.

Note: The sum of all weights for the KPI must equal `100`.

Table 5. Event Counts and Weighting

Event ID	Event Count	Unweighted	Weighted
Event1	10	20%	50%
Event2	8	20%	20%
Event3	6	20%	10%
Event4	4	20%	10%
Event5	0	20%	10%

Unweighted KPI Calculations

In the following table, each row represents the KPI calculation for each type of Summary Calculation for the unweighted values.

- In the preceding table, the count for Event5 is set to `0`, which factors into the average calculations.
- Grade Rating is computed by the following formula. Grades are assigned by comparing this Grade Rating to the Grade buckets.

  ```
  Value / Base Activity
  ```

Table 6. Unweighted KPI Calculations

Summary Calculation Type	Value	Formula	Grade Rating
`Total`	28	Count of Event1 + Count of Event2 + Count of Event3 + Count of Event4 + Count of Event5	56.00%
`Average Including 0`	5.6	(Value of `Total` / #Events (5))	11.20%
`Average Excluding 0`	7	(Value of `Total`) / 4) • Excludes Event5	14.00%

Weighted KPI Calculations

For weighted KPI calculations, the base weight of each KPI is factored against the weighted counts of each KPI by using the following formulas:

```
base weight = 100% / # of KPI events
```

The weighted count is calculated by using the user-defined weights as a ratio to the base weight, as in the following formula:

```
weighted count= event count * (event weight / base weight)
```

The rating for each KPI event is then calculated as follows:

```
grade rating = sum of weighted counts / base activity count
```

In the table below, each row represents the KPI calculation for each type of Summary Calculation for the Weighted values.

- In the previous example, the count for Event5 is set to `0`, which factors into the following average calculations.

Table 7. Weighted KPI Calculations

Summary Calculation Type	Value	Formula	Grade Rating
`Total`	38	Sum of ((Count of Event) * (Weighted/ Unweighted)) for all event types	76.00%
`Average Including 0`	7.6	(Value of `Total` / #Events (5))	15.20%
`Average Excluding 0`	9.5	(Value of `Total`) / 4) • Excludes Event5	19.00%

Configuring Process Scorecards

Process scorecards are used to measure the effectiveness of a business process or function. Example processes include placing an order for products at an online shopping site or registering for a new user account at an online banking site.

These scorecards automatically measure and score overall success, abandonment, and failure rates within each step of a critical online business process or across the entire process.

- Abandon step: An event or a set of events that represents abandonment of a business process by the visitor. For example, a request from the visitor's web browser for the Order Canceled page signifies the abandonment of an order placement process.
- Failure step: An event or set of events that represents failure of a business process. For example, the appearance of an HTTP 500 (internal server error) page might signify failure of a business process.
- For more information about terminology, see Chapter 2, "Using Scorecards," on page 5.

Accessing

Figure 15. Process Scorecard

To access Process scorecards:

1. In the Tealeaf Portal menu, select **Configure** > **Scorecards**.
2. In the Configuration pane, click **Process Scorecards**. The list of available Process scorecards is displayed. Available commands:

Command	Description
	To edit an existing scorecard, select it and click **Edit** at the top of the pane.
	To create a new one, click **New**.
	To delete a scorecard, select it and click **Delete**.

When you add or edit a Process scorecard, configure the scorecard through the following tabs:

Tab	Description
General	The general information for the scorecard.
Events	Select the **Tealeaf** events, including Abandonment and Failure events to monitor in the scorecard.
Grades	The Process, Abandonment, and Failure grades.
Permissions	The User Group-level permissions for viewing the selected scorecard within the Portal.

For more information about scheduling scorecards, see Chapter 3, “Configuring Scorecards,” on page 19.

- For more information about configuring access permissions for reports, see "Report Access Permissions" in the *IBM Tealeaf cxImpact Administration Manual*.

General tab_a

The General tab for Process Scorecards is where the title and state of the scorecard can be configured.

Note: If a scorecard is not set to active, it is not processed, and the scorecard's report contains no data.

Figure 16. Process Scorecard - General tab

By default, a newly created scorecard is assigned to the `No Dimension Report Group` report group, which means that you cannot apply dimension filters on any of the report data. Optionally, you can filter the scorecard to display data only when a specific dimension value is present. For example, you can build a Process scorecard to track conversion rates for the State dimension value `CA` (California).

Note: Scorecards that use a dimension to filter data cannot be used in IBM Tealeaf cxResults.

- If you apply a specific report group to the scorecard, all events in the scorecard must also contain that report group. If they do not, they are discarded.
- For more information about filtering by dimension values, see Chapter 2, “Using Scorecards,” on page 5.

Tealeaf can automatically calculate the Overall Abandonment Rate and the Step Abandonment Rate. To auto-calculate abandonment, select **Automatically Calculate Abandonment**.

- If this option is cleared, you can specify abandonment steps in the Events tab.

Events tab

In the **Events** tab, you select the events that are used to define the steps of the process and the abandonment and failure states. This tab is used to specify the events that define an entire business process from start to completion, in the order of occurrence.

- To toggle the display of aliases in the scorecard configuration page, click the **View Aliases** check box. This setting is not saved with the scorecard itself.

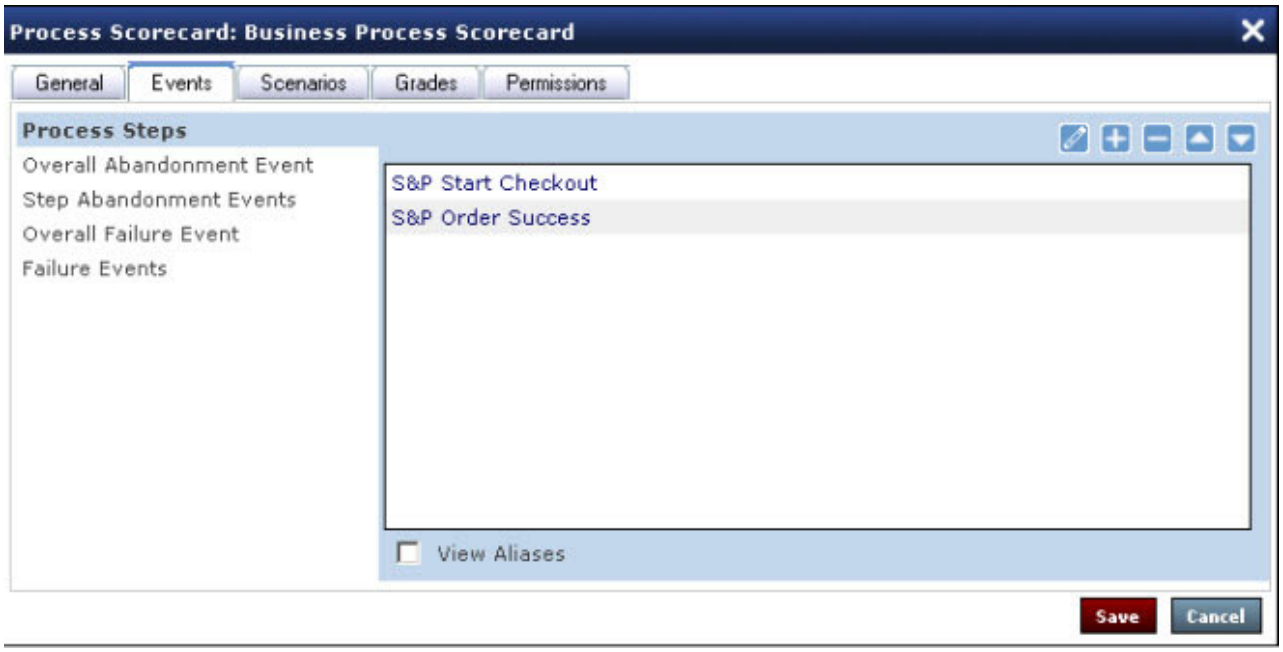

Figure 17. Process Scorecard - Events tab

The **Events** tab for Process Scorecards reviews the events that define the process and the ones that determine whether a visitor completed, abandoned, or failed the process.

You can define one overall Abandonment event and one overall Failure event for the process. These events are used to calculate the Abandonment and Failure grades.

- Abandonment events are often used to mark a process as incomplete.
- Failure events signify an error in the process.

For an overview of how to add events for Process scorecards, see "Creating Events for Business Process Scorecards" on page 38.

Configuration steps:

1. **Process Step**s
2. **Overall Abandonment Event**
3. **Step Abandonment Events**
4. **Overall Failure Event**
5. **Failure Events**

For a tutorial on creating some of these events, see "Creating Events for Business Process Scorecards" on page 38.

Process Steps

A business process is defined as a series of two or more events. There must be at least two steps: a start event and a completion event. There is no maximum number of steps.

Note: When you configure process scorecard, verify that each included process step is achieved by 100 percent of visitors who complete the business process. Otherwise, the process abandonment count on the scorecard is inaccurate.

- When you define process events, define the minimum set to exactly match the requirements of the process. Events do not have to be defined whether they occur on consecutive pages.

To define the events of a process:

1. In the **Events** tab, click **Process Steps**.
2. The events of the process are listed in the order in which they are expected for successful completion of a process.
3. Using the icons above the list of events, you can edit, add, or remove steps or shift them up or down in the list:

Icon	Description
	Edit the selected process step.
	Add Process step.
	Delete the selected Process step.
	Move the selected Process step higher in the list.
	Move the selected Process step lower in the list.

4. You can reorder events as needed.

Configure Aliased Event

When you add or edit an event in the process scorecard, the Configure Aliased Eventdialog is displayed:

1. Enter an alias for the event. The alias can be used as a friendly name for the event, which is useful for technical or otherwise complicated event names. The alias is displayed for Tealeaf users in the Scorecard report.
2. Click the link next to event. The **Event Selector** displays all events that can be included in the business process.

   Note: If a report group is configured for the scorecard in the **General** tab, only events that share this report group are available for inclusion as a Process step.
3. To save the event to the process, click **Save**.

Overall Abandonment Event

Each business process can have one event that signifies that the visitor abandoned the process. If defined, the overall Abandonment event is used to calculate the Abandonment grade. If it is not defined, the total of the individual Abandonment events is used instead.

- Abandonment means that the visitor stopped work on completing the process to either explore elsewhere on your website or to go to another website.
- If wanted, you can configure the scorecard to automatically calculate abandonment rates for you in the General tab.

To define the overall Abandonment event:

1. In the **Events** tab, click **Overall Abandonment Event**.
2. The event that is defined as the Abandonment event is displayed. To change it, click the **Edit** or the Plus icon.

3. The Configure Aliased Event dialog is displayed.
4. Make necessary changes.
5. To save the Abandonment event, click **Save**.

Step Abandonment Events

You can define one or more Step Abandonment events, which you can use to track abandonment at individual steps in the process.

Note: To avoid double-counting, no step must occur more than one time in the process.

- If wanted, you can configure the scorecard to automatically calculate abandonment rates for you in the General tab.

To define the Step Abandonment events:

1. In the **Events** tab, click **Step Abandonment Events**.
2. Any currently defined Step Abandonment events are displayed.
3. To add, click the **Plus** icon. To change an existing one, select it and click the **Edit** icon.
4. The Configure Aliased Eventdialog is displayed.
5. Make necessary changes.
6. To save the Step Abandonment event, click **Save**.
7. In the**Events** tab, you can use the arrow keys to reorder how the events are displayed in all scorecards that reference them.

Overall Failure Event

Each business process can have one event that signifies that the visitor failed to complete the process. If defined, the overall Failure event is used to calculate the Failure grade. If it is not defined, the total of the individual Failure events is used instead.

- Failure means that the visitor tried to complete the process but failed because of a workflow or technical issue. For example, the event can be a combination of events that monitor 1) the start of the process, 2) status code errors, and 3) session end.

To define the overall Failure event:

1. In the Events tab, click **Overall Failure Event**.
2. The event that is defined as the Failure event is displayed. To change it, click the **Edit** or Plus icon.
3. The Configure Aliased Event dialog is displayed.
4. Make necessary changes.
5. To save the failure event, click **Save**.

Failure Events

You can define one or more Failure events, which you can use to track failures at individual steps in the process. These failures might be status code errors or error messages that are presented to the visitor through the application.

Note: To avoid double-counting, no step should occur more than once in the process.

To define the Failure events:

1. In the **Events** tab, click **Failure Events**.
2. Any currently defined Failure events are displayed.
3. To add a new one, click the plus icon. To change an existing one, select it and click the edit icon.
4. The Configure Aliased Event dialog is displayed.
5. Make necessary changes.
6. To include the Failure event in the process scorecard, click **Save**.
7. In the **Events** tab, you can use the arrow keys to reorder how the events are displayed in all scorecards that reference them.

Grades tab

Process grades are used to mark the overall rate of successful completion of a process. You can assign letter grades that are based on the percentage of sessions. It can be completed, abandoned, or failed in comparison to the total number of sessions that began the process.

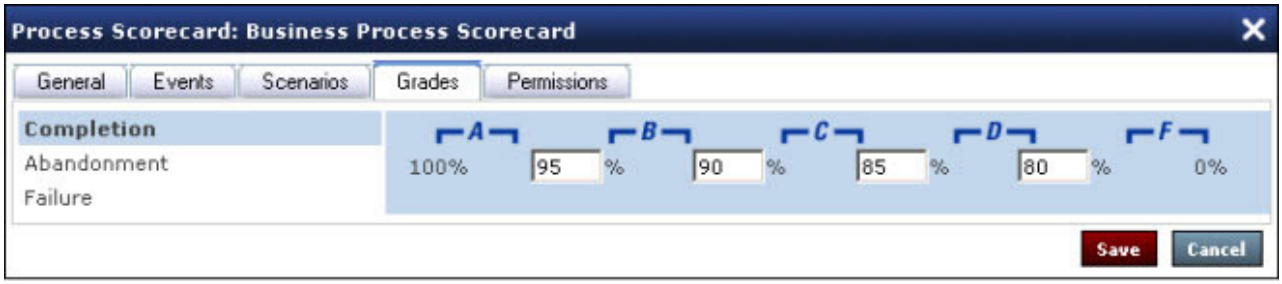

Figure 18. Process Scorecard - Grades tab

Depending on the event, 100% can be a good or a bad result.

- Completions of a process are good results, so grades improve as the percentage increases.
- Abandonment and failure grades go from 0% to 100%, becoming worse as the percentage increases.

The grades that are defined here are displayed on the Scorecard report page.

Permissions tab

Scorecard permissions are used to restrict the viewing of a particular scorecard to specific Portal user groups. Selected user groups can see and select the scorecard on the Scorecard Report page.

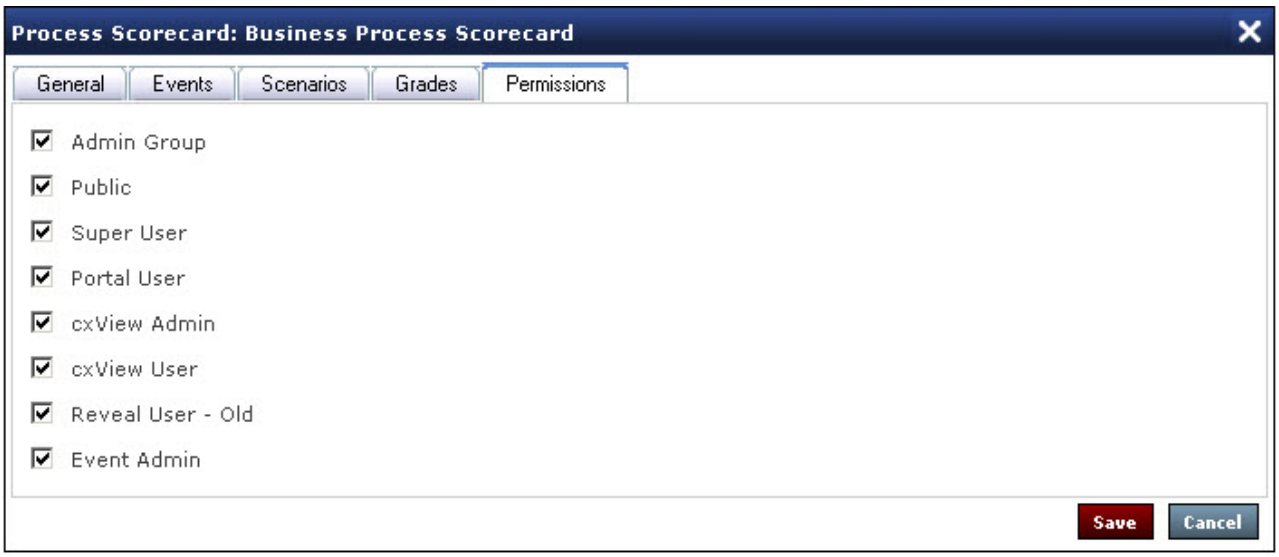

Figure 19. Process Scorecard - Permissions tab

Note: Settings that are defined in page apply only to viewing Scorecards and do not affect permissions for administration of Scorecards. Any user or group that can access the Configuring Scorecardspage can configure any displayed scorecard. See "cxView Settings" in the *IBM Tealeaf cxImpact Administration Manual*.

Saving

You can save your scorecard at any time. Click **Save**.

- To cancel the scorecard creation process, click **Cancel**.

  Note: Canceling stops the scorecard creation process without saving changes to other tabs. All unsaved changes are lost.

Creating Events for Business Process Scorecards

Events for business process steps must be defined carefully. The event count of process completions, abandonments, and failures must match total of 100 percent of the number of process starts.

Suppose a business process consists of three pages:

1. `pageA.jsp`
2. `pageB.jsp`
3. `pageC.jsp`

You must define simple page events to detect that pages are displayed to the visitor. Page events, called page A through page C, can be triggered by the URLs. For the Process scorecard definition, the following events must be added.

Note: For every step of the process, verify that the first step is present in the session.

Process step events

1. Start process step: event page A.
2. Process step 2: session-level event of start process step (page A) AND page B. This definition ensures that the session contains both the starting step and the second step of the business process.
   - For this process and all subsequent process steps, the starting step of the process must be present in the session. A session fragmentation can result in attempting to grade a session fragment that does not contain the start of the business process.
3. End process step: session-level event of start process step (page A) AND page C. This definition ensures that the session contains both the starting step and the ending step of the business process.

Failure step events

Session-level event of start process step (page A) AND process step 2 AND NOT the end process step AND NOT the Abandonment step.

Start process step ensures that session fragmentation does not cause this event to fire falsely in session fragments that do not contain the beginning portion of the business process.

Excluding the Abandonment step event ensures that the count of process failures does not overlap the count of process abandonments.

Abandonment step events

Session-level event of start process step (page A) AND NOT the end process step AND NOT the Failure step. The start process step ensures that session fragmentation does not cause this event to fire falsely in session fragments that do not contain the beginning portion of the business process.

Excluding the Failure step event ensures that the count of process abandonments does not overlap the count of process failures.

If there are more process steps between the beginning and end steps, each step must be a session-level event including the start process step.

Note: Session fragmentation can cause the Abandonment or Failure steps to fire if the session times out and is fragmented partway through the business process. To avoid systematic fragmentation, configure the Canister session idle timeout to be equal to your application's session timeout, if possible.

Example Scorecards

This section contains examples of how to define KPI scorecards and process scorecards to report on typical availability indicators and a typical business process. Decisions about the definition of process steps and availability indicators must be tailored to your own business and application when you configure your own scorecards.

Example Business Process

These examples are illustrations of the Example Business Process.

Suppose you want to define a commonly encountered business process: order placement. In this example, the business process is defined as follows:

Process Steps

1. The beginning of the order placement process is defined as the moment when the visitors first add an item to their shopping basket. It also includes retrieval of a previously saved shopping basket.
2. The next major step of the process is when the visitor begins the order submission sequence by clicking **Checkout**.
3. On the next page, the visitor provides shipping and payment information.
4. Following that is the final order inspection/submission page.
   - If the visitor clicks **Submit Order** here, the order confirmation page is presented.
   - If the **Cancel Order** button is clicked instead, the order cancellation page is presented.
5. Finally, if the **Continue Shopping** button is clicked, the visitor is returned to the site's home page and can continue to shop for more items.

If order confirmation page or order cancellation page is displayed after order inspection/submission page, then it marks the end of this business process.

Note: Order cancellation page or any other failure to reach the order confirmation page after you begin the ordering process represents abandonment of this business process.

At any point in the process, the visitor can click **Save Basket** to save the current list of items in the shopping basket for later retrieval.

Process Web Pages

The product that is ordering business process on our example website consists of the following sequence of pages, listed here by name:

1. Beginning of the business process, either of the:
   a. Add item to shopping basket: `/addtobasket.jsp`. This step can occur multiple times, with visits to other pages in the site. For example, product search or browsing pages, other products' detail pages interspersed.
   b. Retrieve previously saved shopping basket: `/getsavedbasket.jsp`.
2. Checkout page: `/checkout.jsp`.
3. Shipping and payment information entry page: `/shipping.jsp`.
4. Order inspection and submission page: `/confirm.jsp`.
5. End of this business process through either of the following pages:
   - Order confirmation page: `/ordercompleted.jsp`.
   - Order canceled page: `/ordercanceled.jsp`.

Presentation of the order canceled page or any other failure to reach the order confirmation page, represents abandonment of this business process.

- Saving a basket through `/savebasket.jsp` or continuing to shop for more items after the order inspection/submission page is presented does not constitute an abandonment. These events are postponement of completion of the ordering process.
- Special handling is required for orders that are saved during a session but never submitted during that session. It can be necessary to define two slightly different business processes account for saving a shopping basket.

Tealeaf users can decide whether they are interested in just the workflow of submitting an order or it is friendly and usable, regardless of beginning of the order.

Example 1: Checkout Process Scorecard

Define per-hit events to detect the URLs listed and assign them to the sections of the scorecard definition as shown.

- You can create events by using the pre-configured pattern to match the URL, setting the condition of each event to be one of following file names listed. See "TEM Events Tab" in the *IBM Tealeaf Event Manager Manual*.

Process Steps: The sequence of steps in the process is defined by events that detect the following URLs, occurring in this order:

- `/addtobasket.jsp OR /getsavedbasket.jsp`
- `/checkout.jsp`
- `/shipping.jsp`
- `/confirm.jsp`
- `/ordercompleted.jsp`

Abandonment Step: `/ordercanceled.jsp`
Failure Step: Define the failure step to be a compound event by using as conditions the output of all error events that can apply to the process pages. These conditions must be configured to a logical `OR` evaluation.

Example 2: Checkout Process Scorecard with Advanced Abandonment

This example creates a more sophisticated measure of abandonment. Define the following events that are listed and assign them to the sections of the scorecard definition as shown.

Process Steps: The sequence of steps in the process is defined by events that detect the following URLs and evaluation to `true` if they are present.

- `/checkout.jsp`
- `/shipping.jsp`
- `/confirm.jsp`
- `/ordercompleted.jsp`

Abandonment Step: Create an event with an `End of Session` trigger that evaluates all of the following things:

- `/checkout.jsp OR /shipping.jsp OR /confirm.jsp`
- `NOT /ordercompleted.jsp`
- `NOT` the failure step event (next step)

Failure Step: Create an event with an End of Session trigger that evaluates all of the following things:

- /shipping.jsp AND /confirm.jsp, NOT /ordercompleted.jsp

In the previous example, the process can be abandoned or failure, but not both.

Example 3: New User Registration

The following process scorecard definition can be used as a template for measuring the process for registering a new user. This process is defined by three simple steps:

- /registernewuser.jsp
- /registrationcompleted.jsp
  - If the registration is successful, a message is included in the response:

    Thank you for registering.

Define the events that are listed and assign them to the sections of the scorecard definition as shown.

Process Steps: The sequence of steps in the process is defined by events that detect the following URLs.

- /registernewuser.jsp
- /registrationcompleted.jsp

Abandonment Step: Create an event with an End of Session trigger that evaluates all of the following things:

- /registernewuser.jsp
- NOT response contains the phrase "Thank you for registering."

Example 4: Insurance Policy Purchase

The following scorecard definition monitors a simple transaction to purchase an insurance policy.

Define the following events and assign them to the sections of the scorecard definition as shown.
Process Steps: The sequence of steps in the process is defined by events that detect the following pages of the application.

- Policy Holder Information
- Insured Party Details
- Review
- Notices
- Payment Information
- Payment Method
- Confirmation
- Policy Welcome

Abandonment Step: Create an End of Session event that is composed of events 1 AND NOT 8 AND NOT 6.

Failure Step: Create an End of Session event that is composed of Events 1 AND 7 AND Global Error Page AND NOT 8.

KPI Scorecard Example 1: Checkout

This scorecard measures the performance of key pages in the following checkout process.

1. Create scorecard: Define per-hit events to detect the following conditions:
   a. Create a simple per-hit event that detects all HTTP client error (4xx) status codes by looking for the following string in the Tealeaf request:
      `\nStatusCode=4`
   b. Create a simple per-hit event that detects all HTTP server error (5xx) status codes by looking for the following string in the Tealeaf request:
      `\nStatusCode=5`
   c. Create an `After Every Hit` event that uses the above two events as conditions to detect all HTTP error status codes.
   d. Create five `After Every Hit` events that detect the preceding error-detecting event when it occurs on each of the five pages that are listed as Process Steps. See "Example Scorecards" on page 39.
   e. Create an `After Every Hit` event of all the page-specific events that are defined in the previous step to detect the error-detecting event when it occurs on any of the Process Step pages.
2. Create scorecard: Create a KPI scorecard that uses Negative Comparison.
3. Use the event that is detecting the process's first page (which can be either `/addtobasket.jsp` or `/getsavedbasket.jsp`). Configure the count of this event to be the scorecard's activity indicator.
4. In the scorecard, create a single availability group by using the five page-specific "all errors" events and weight them by the importance of each page. These weights can be used to define the availability letter grade. For example, the grading weights can be:
   - HTTP error code on `/addtobasket.jsp OR /getsavedbasket.jsp`: 5%
   - HTTP error code on `/checkout.jsp`: 20%.
   - HTTP error code on `/shipping.jsp`: 10%.
   - HTTP error code on `/confirm.jsp`: 15%.
   - HTTP error code on `/ordercompleted.jsp`: 50%.

KPI Scorecard Examples: Retail Shopping Site

This scorecard measures the performance of key pages in a retail shopping site.

Events used

For the following examples, the list of events that are used in the scorecard definition is as follows.

The following events are based on Tealeaf request variables:

HTTP Status Code

- `HTTP 400 - Bad Request`
- `HTTP 401 - Unauthorized`
- `HTTP 402 - Payment Required`
- `HTTP 403 - Forbidden`
- `HTTP 404 - Not Found`
- `HTTP 405 - Method Not Allowed`

- HTTP 500 - Internal Server Error

HTTP USER AGENT

- Googlebot Visit
- MSNbot Visit

Hit property exceeds threshold value

- Large Page Size
- Long Page Generation Time
- Page Generation > 5s - Create this Boolean event to evaluate the output of the Page Generation Time event.
- Page Generation Time > 10s - Create this Boolean event to evaluate the output of the Page Generation Time event.
- Page Generation Time > 15s - Create this Boolean event to evaluate the output of the Page Generation Time event.
- Page Generation Time > 20s - Create this Boolean event to evaluate the output of the Page Generation Time event.

0-sized response

- Create Boolean event to detect value of the Session Response MB event is equal to 0.

URL

Note: These events must be created for your specific web application to detect the URLs of the pages where these business functions are performed.

- Checkout: Sign-in
- Checkout: Billing and Shipping
- Checkout: Payment
- Checkout: Summary
- Checkout: Confirmation
- Web Application 1
- Web Application

HTTP REFERER

- Came from Login Page - Create this event to detect the value of the REFERRER item in the request that is indicating the login page of your web application.
- Came from shopping cart - Create this event to detect the value of the REFERRER item in the request that is indicating the shopping cart page of your web application.

Login field in [urlfield] section of Tealeaf request

- Non-blank login field
- Login field not present

Useful events based on response text

- Error uncompressing page
- Global Error Page
- Credit Card Declined
- Credit Card Number Invalid

- Credit Card Zip Code Mismatch

Compound Events

- Came to Billing page from shopping cart: Events 1(e)ii AND 1(f)ii
- Came to Billing page sign-in through login: Events 1(e)ii AND 1(g)i
- Came to Billing page through anonymous sign-in: Events 1(e)ii AND 1(f)i AND 1(g)ii
- Checkout count: OR of all Events in 1e
- Page Generation Time > 5s in Checkout: Events 1(c)iiA AND 3d
- Page Generation Time > 10s in Checkout: Events 1(c)iiB AND 3d
- Page Generation Time > 15s in Checkout: Events 1(c)iiC AND 3d
- Page Generation Time > 20s in Checkout: Events 1(c)iiD AND 3d
- 0-sized response in Checkout: Events 1d AND 3d
- Global Error Page in Checkout: Events 2b AND 3d
- HTTP 40x - 403 OR 404 Errors: Events 1(a)iv OR 1(a)v
- Web Application 1 - 40x Errors: Events 1(e)vi AND 3k
- Web Application 1 - 500 Errors: Events 1(e)vi AND 1(a)vii
- Web Application 1 - Long Page Time: Events 1(e)vi AND 1(c)iiE
- Web Application 1 - Large Page Size: Events 1(e)vi AND 1(c)i
- Web Application 2 - 40x Errors: Events 1(e)vii AND 3k
- Web Application 2 - 500 Errors: Events 1(e)vii AND 1(a)vii
- Web Application 2 - Long Page Time: Events 1(e)vii AND 1(c)iiE
- Web Application 2 - Large Page Size: Events 1(e)vii AND 1(c)i

KPI Scorecard Example 2: Checkout

Define the following KPI groups.

Checkout Errors

- Global Error Page in Checkout
- 0-sized response in Checkout
- Page Generation Time > 5s in Checkout
- Page Generation Time > 10s in Checkout
- Page Generation Time > 15s in Checkout
- Page Generation Time > 20s in Checkout
- Checkout Paths
- Came to Billing page from shopping cart
- Came to Billing page sign in through login

KPI Scorecard Example 3: Site Errors

Define following KPI groups.

Status Code Errors

- HTTP 400 - Bad Request
- HTTP 401 - Unauthorized
- HTTP 402 - Payment Required
- HTTP 403 - Forbidden

- HTTP 405 - Method Not Allowed
- HTTP 500 - Internal Server Error
- Handled Application Errors
- Global Error Page
- Page Errors
- 0-sized response
- Error uncompressing page
- Large Page Size

KPI Scorecard Example 4: Spiders

Define the following KPI groups.

Spider Visits

- Googlebot Visit
- MSNbot Visit

KPI Scorecard Example 5: Transaction Failures

Define the following KPI groups.

Credit Card Failures

- Credit Card Declined
- Credit Card Number Invalid
- Credit Card Zip Code Mismatch

KPI Scorecard Example 6: Unacceptable Response Time

Define the following KPI groups.

Response Time Errors

- Page Generation Time > 5s
- Page Generation Time > 10s
- Page Generation Time > 15s
- Page Generation Time > 20s

KPI Scorecard Example 7: Multiple Applications

Define the following KPI groups.

Web Application 1

- Web Application 1 - 40x Errors
- Web Application 1 - 500 Errors
- Web Application 1 - Long Page Time
- Web Application 1 - Large Page Size
- Web Application 2 - Large Page Size

Scorecards

The following IBM Tealeaf cxView settings apply to scorecard data retention:

- Data Trimming
- Scorecard Data - Days Retain
- Scorecard Data - Months Retain
- Scorecard Data - Weeks Retain
- Scorecard Email - Attach HTML
- Scorecard Update Frequency

See "cxView Settings" in the *IBM Tealeaf cxImpact Administration Manual*.

The following IBM Tealeaf cxImpact settings apply to scorecards:

- SMTP From Address(Scorecards)
- SMTP From Name(Scorecards)

For more information about these settings, see "CX Settings" in the *IBM Tealeaf cxImpact Administration Manual*.

Dashboards

The following IBM Tealeaf cxView settings apply to dashboards:

- Dashboard distribution frequency (seconds)
- Dashboard distribution priority
- Data Trimming

See "cxView Settings" in the *IBM Tealeaf cxImpact Administration Manual*.

Scorecard Aggregation Dates

From the Scorecard Configuration page, you can review the dates when scorecard data was last retrieved from the database and aggregated for use by individual scorecards.

Overview

When the Data Collector performs an aggregation run for scorecards, the IBM Tealeaf CX database is polled for data that is related to individual scorecards. These scorecards are captured and stored since the last successful run. This data is then aggregated and stored in the Scorecard data tables, which are queried when scorecards are displayed. Thus, scorecard data is stored separately from report data and can be queried and trim independently.

- Separate scorecard runs are performed for daily, weekly, and monthly scorecard data.

To review:

1. In the Portal menu, select **Configure** > **Scorecards**.
2. The Scorecard Configuration page is displayed. In the left navigation pane, click the **Data Management** link.
3. Click **Aggregation Dates**.
4. The dates of the most recent scorecard aggregation runs are displayed in the right panel.

Scorecard Data Type	Last Date Processed
Last Interval for Scorecards (SID=5/Day)	08/25/2010
Last Interval for Scorecards (SID=4/Week)	08/22/2010
Last Interval for Scorecards (SID=3/Month)	08/01/2010
Last Update for Scorecards	08/25/2010

Figure 20. Scorecard Aggregation Dates

In the right panel, you can change the date for the daily scorecard aggregation run for any date that has an Edit icon next to it. When the date is changed, any scorecards that use the date ID are regenerated on the next scorecard run based on the newly selected date. Any of the other intervals between the newly selected date and the current date are also regenerated.

- To edit a scorecard processing interval, select the entry and click the **Edit ( )** icon.

In the Portal Management page, you can also query for this information from each Search Server in your environment. See "Managing Tealeaf Servers" in the *IBM Tealeaf cxImpact Administration Manual*.

Rolling Back Scorecard Aggregation Dates

If scorecard definition changes must be applied retroactively, you can use the rollback feature to apply the changes.

Suppose that you change your scorecard definition and must populate the changed scorecard data retroactively. If the latest Aggregation Date for a specific interval is rolled back, then scorecard data is reaggregated from the date forward, across all intervals.

Note: Depending on the number of scorecards in your Tealeaf solution, rolling back the scorecard aggregation date can be expensive in terms of processing resources. Tealeaf recommends performing this rollback at an off-peak time.

Note: Rolling back the scorecard date also performs reaggregations for any full weekly or monthly intervals that occur between the previous aggregation date and the new one. For example, if you set the scorecard date back 32 days, 32 daily aggregations, 4 weekly aggregations, and one monthly aggregation are performed.

Note: Before you roll back the scorecard date, you must verify that the Scorecard tables contain data for all intervals that are reaggregated. For example, if your Scorecard tables contain only six days of data. Now, setting the scorecard date back 32 days results in all weekly and monthly aggregations to be based on empty data. For more information about scorecard data trimming, see the data retention settings in "cxView Settings" in the *IBM Tealeaf cxImpact Administration Manual*.

After the scorecard date is reset, when the scorecard data for that interval is next processed, Tealeaf effectively recalculates the scorecard data from that date forward. After a scorecard definition is changed by adding or removing events, previously calculated data becomes invalid.

Verifying Scorecard Data

Complete the following steps to verify that scorecard data is present in the current system.

1. Log in to the Tealeaf Portal as an administrator.
2. From the Portal menu, select **Analyze** > **Scorecards**.
3. In the toolbar, click the **Folder** icon to open a scorecard.
4. Select a scorecard that is known to have daily data updates. Click **Select**.
5. The scorecard is loaded. By default, the scorecard displays data from the current day.
6. In the toolbar, click the **Calendar** tool.
7. Select a range of dates. For example, if you recently upgrade the system, you can choose to select a range of dates from before the date of the upgrade.
8. The scorecard must show data.

Notes on upgrades

If no data is displayed, it is likely that the scorecard data was not successfully moved during the inline database upgrade. Tealeaf recommends upgrading and moving the databases after the software upgrade is completed. In some situations, this out-of-line upgrade cannot be possible, so you must force a recalculation of all scorecard data through the Tealeaf Portal.

Note: Scorecard recalculation occurs at the top of the next hour after the recalculation is issued. Depending on the number of scorecards, this process can take a while. After upgrade, you can schedule this recalculation during off-peak hours.

Note: Recalculation of scorecards can take significant time and system resources. It depends on the number of scorecards and volume of data that was moved from Release 7. Tealeaf recommends completing the scorecard recalculation during off-peak hours.

Forcing Scorecard Recalculation Using All Available Data

Use the following steps to force a recalculation of all scorecards by using all data available in the system. You can also apply previously calculated data to redefined scorecards. For example, if you switch a scorecard definition to use a new event, you can force a recalculation of all scorecards by using the available historical data.

Note: The number of days that you extend the scorecard calculation range in the past is directly correlated to how long the recalculation takes. Depending on the length of time and number of scorecards in the system, this recalculation can impact system performance. If possible, you should conduct lengthy recalculations during off-peak periods.

1. Log in to the portal as an administrator.
2. From the portal menu, select **Tealeaf** > **Portal Management**.
3. In the left navigation panel, click the IBM Tealeaf CX Settings entry.
4. Click the**Data Retention** link.
5. Review the value for `Reporting Data (daily)-Days Retain`. This setting determines the maximum amount of reporting data that is retained in the database. Typically, this value is set to `365`.

Note: If Tealeaf system was installed after the date indicated by this setting, you must calculate elapsed days since the first installation. Use the smaller of the `Reporting Data (daily)-Days Retain` value or the elapsed number of days since installation.

6. Using Excel, you can calculate the following date:

   `Today - (Smaller of two dates above)`

   - This date is used in the following steps to configure the date from which the next scorecard recalculation begins.
7. In the portal menu, select **Configure** > **Scorecards**.
8. In the left panel, click the **Data Management** entry.
9. Click the **Aggregation Dates** link.
10. For the `Last Interval for Scorecards (SID=5/Day)` entry, click the edit icon.
11. Click the **Date** field. From the **Calendar** tool, select the previously calculated date.
12. Click **Save**.
13. If the Data Collector's next run is at the top of the subsequent hour, all scorecards in the system are recalculated from the specified date to the current hour.

Chapter 4. Using Dashboards

A dashboard can be used to monitor fundamentals of the Tealeaf system or track high-level reports on overall website performance. Through dashboards, you can customize your suite of Portal reports to meet your enterprise or personal requirements.

The Tealeaf system provides several pre-configured dashboards, and you can create more dashboards to meet various reporting and user group needs. Each dashboard is composed of one or more reporting components, which can be reports, charts, or tables.

- For more information about provided dashboards, see "Dashboards Provided by Tealeaf" on page 53.
- A dashboard displays data from a single day. You can configure the dashboard to display data from a different date in the Dashboard Options window.
- You can select dashboards from the **Dashboards**menu in the portal, which contains your default dashboard and the five used most recently dashboards.
- To select from all available dashboards, select **Dashboards** > **More...** in the portal menu. From the **Dashboard Selector**, select the dashboard to display. Then, click **Select**.

  Note: Access to the dashboard menu is controlled by permissions that are configured for your user account. For more information, contact your Tealeaf administrator.
- For more information about configuring dashboards, see Chapter 5, "Configuring Dashboards," on page 57.

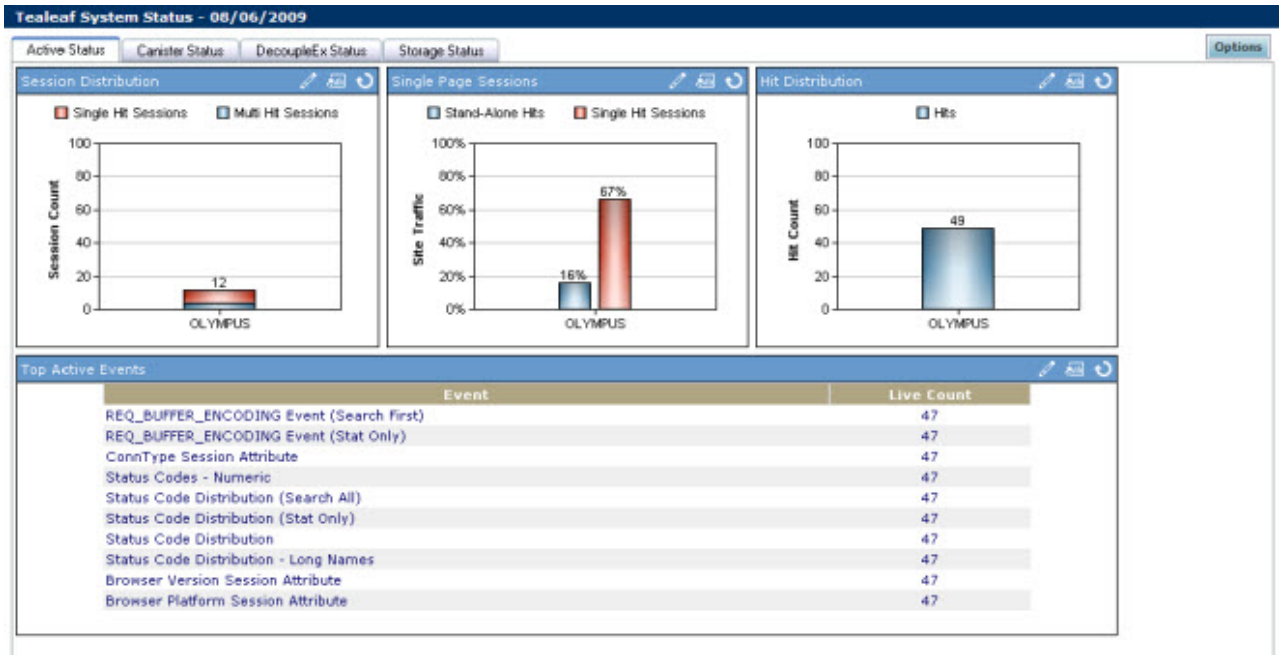

Figure 21. Dashboard

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Dashboard Options

To access dashboard options, click **Options** in the upper-right corner.

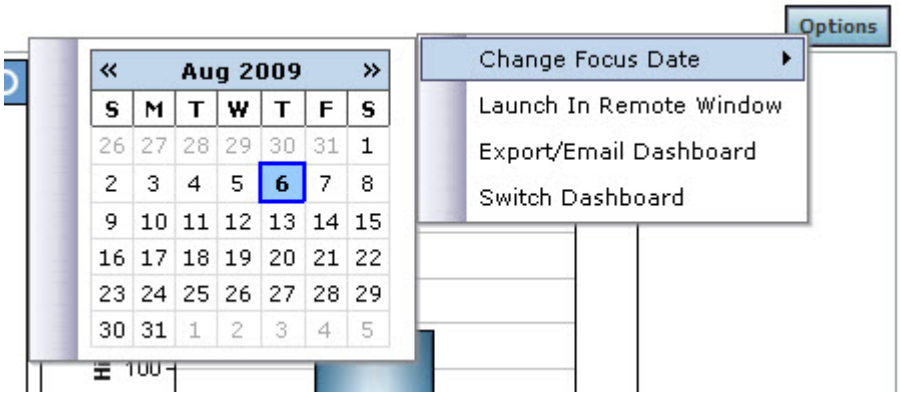
Options
Change Focus Date
Launch In Remote Window
Export/Email Dashboard
Switch Dashboard
« Aug 2009 »
S M T W T F S
26 27 28 29 30 31 1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30 31 1 2 3 4 5
100

Figure 22. Dashboard Options

The following options are available.

Option Description

Change Focus Date
To change the date for which the dashboard displays data, move the mouse over **Change Focus Date**. The calendar is displayed. Use the calendar controls to select the date whose data you want to display in the dashboard.

Note: For dashboards that display current system data or data from a fixed period, the focus date does not apply.

Launch in Remote Window
To display your dashboard in a second browser window, click **Launch in Remote Window**. This option is useful if you want to monitor activities in your browser while you complete other tasks in the Portal.

Export/Email Dashboard
Export or email the current dashboard. For more information about exporting a dashboard, see “Exporting Dashboards” on page 55.

Switch Dashboard
To select a different dashboard, click **Switch Dashboard**. In the **Dashboard Selector**, select the new dashboard to display.

Report Access Permissions

Note: You must have access and permissions to view the dashboard menu or any specific dashboard with all its components. For example, if the dashboard contains scorecards, you must have permissions to view each scorecard and access to the scorecard feature in the Portal (**Analyze** > **Scorecards**), which is governed by IBM Tealeaf cxView group permissions. The same applies to Report Builder and Top Mover components of dashboards.

For more information about configuring access permissions for reports, see "Report Access Permissions" in the *IBM Tealeaf cxImpact Administration Manual*.

Configuring Dashboards

Depending on your account permissions, you can create and share your own dashboards. See Chapter 5, “Configuring Dashboards,” on page 57.

Dashboard Report Data

At regular intervals, the Tealeaf Data Collector polls each Canister for session data to aggregate and store in the appropriate databases. When a scorecard or dashboard is queried, this aggregated data is used to populate the report.

- Typically, the Data Collector polls at 5-minute intervals. For more information about settings, see "CX Settings" in the *IBM Tealeaf cxImpact Administration Manual*.

The Data Collector requires access to all Canisters in the Tealeaf environment, and all Canisters must be receiving data. If an active canister is not receiving data or cannot be reached because of network interruption, the data collector fails the data collection process. It happens as running a partial collection corrupts the reports that use it.

Note: All Tealeaf Canisters must be receiving session data and must be accessible over the network. If any canister is unavailable or not receiving data, report data collection is suspended. Scorecards and dashboards are not updated with new data until the problem is fixed. When collection resumes, reports are not updated until all spooled canister data is collected, aggregated, and stored in the database.

- Hits are evaluated against the set of current set of events at the time of evaluation. If hits are spooled or otherwise not processed immediately, there can be effects in reporting if changes are made to event-related objects in the interim. For more information, "Tealeaf Event Manager" in the *IBM Tealeaf Event Manager Manual*.
- For more information about data collection, see "Data Aggregation and Retention" in the *IBM Tealeaf cxImpact Administration Manual*.
- For more information about managing Canisters, see "Managing Tealeaf Servers" in the *IBM TealeafcxImpact Administration Manual*.

Dashboards Provided by Tealeaf

Tealeaf provides the following dashboards:

Note: Depending on the menu profile in your user account and the licensed Tealeaf products, you cannot have access to these dashboards. For more information, contact your Tealeaf administrator.

Table 8. Dashboards Provided by Tealeaf

Dashboard Name	Tealeaf Product	Description
Tealeaf System Status	IBM Tealeaf cxView	Dashboard contains status reports on Active, Canister, DeCoupleEx, and Storage aspects of the Tealeaf system. See "System Status" in the *IBM Tealeaf cxImpact Administration Manual*.

Table 8. Dashboards Provided by Tealeaf (continued)

Dashboard Name	Tealeaf Product	Description
Technical Site Metrics	IBM Tealeaf cxView	This dashboard provides detail reports on current user, session, and page-level data. See "Technical Site Metrics Dashboard" in the *IBM Tealeaf Reporting Guide*.
IBM Tealeaf cxReveal Executive Dashboard	IBM Tealeaf cxReveal	For IBM Tealeaf cxReveal executives and managers, this dashboard provides insight into IBM Tealeaf cxReveal user searches and replays. See "cxReveal Overview Dashboard" in the *IBM Tealeaf cxReveal User Manual*.

Dashboard Tabs and Components

Components can be placed into one or more tabs. Each tab contains the components that are defined by the creator of the dashboard. Each component has controls for editing, drill-down, and refresh.

A dashboard tab is composed on multiple dashboard components, which are independent pieces of dashboards. Each dashboard component panel contains a graphical or numerical display of the component's content.

At the top of each panel, you can make the following selections:

Button Description

To edit the component, click the **Edit**icon. See Chapter 5, “Configuring Dashboards,” on page 57.

To view the underlying data, click **View Report Data**icon.

View report details on the underlying report.

- See "Tealeaf Report Builder" in the *IBM Tealeaf Reporting Guide*.

To refresh the display of the dashboard component, click the **Refresh**icon.

- To refresh all dashboard components, click the **Refresh** on your browser.

Change dashboard options. See Chapter 4, “Using Dashboards,” on page 51.

If you own the dashboard, any changes to the layout are saved and are applied to other users who are sharing your dashboard. Otherwise, changes to the layout for a dashboard that you do not own are temporary.

- Multiple dashboards can use the same component.

  Note: If you change the component in one dashboard, it affects all instances of the component in other dashboards.

Exporting Dashboards

In the **Options**menu, to export a dashboard snapshot, click **Export/Email Dashboard**.

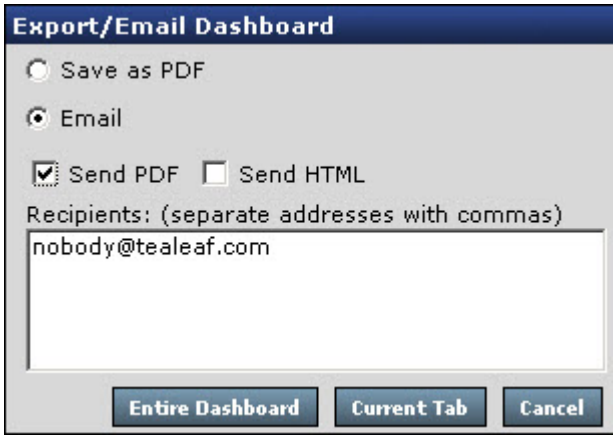

Figure 23. Export/Email Dashboards

To export:

1. To open or save the report locally in PDF format, click **Save as PDF**.
2. To email the report, click **Email**.

   Note: To configure and deliver report snapshots from the Portal, you must enter a valid email address for your user account. See "My Settings" in the *IBM Tealeaf cxImpact User Manual*.
3. Choose output format: `Send PDF` or `Send HTML`.

   Note: Depending on the size of the components on the dashboard, some parts of components with insufficient screen size cannot be displayed in PDF format. You can either export by using HTML format, which supports scrolling of elements, or resize the components in the dashboard configuration. See Chapter 5, “Configuring Dashboards,” on page 57.
4. Specify recipients as a comma-separated list of email addresses.
5. To send the configured export, select to export the entire dashboard or the current tab.
   - To cancel dashboard export, click **Cancel**.

Chapter 5. Configuring Dashboards

Through Tealeaf dashboards, you can customize your suite of portal reports to meet your specific needs. A dashboard can be used for monitoring the system fundamentals of the Tealeaf system or for tracking high-level reports on overall website performance.

- To configure your Dashboards, select **Configure** > **Dashboards** in the **Portal** menu.

For more information about Dashboards, see *IBM Tealeaf cxResults User Manual* and *IBM Tealeaf cxImpact Administration Manual*.

Overview

A single dashboard can be composed of multiple dashboard components, which are independent pieces that can be added or removed from dashboards. Multiple dashboards can use the same component. Changes to the component in one dashboard affects all instances of the component in other dashboards.

Tealeaf report charts and tables can be used as dashboard components.

- For more information about creating reports, see "Tealeaf Report Builder" in the *IBM Tealeaf Reporting Guide*.
- For more information about adding them to dashboards, see “Components Screen” on page 63.

Overview of Configuring Dashboards

In the Configuring Dashboards screen, you can create and edit dashboards, which can contain one or more components. Additionally, you can manage dashboard snapshots, sharing, and import and export of your dashboards and their components.

Figure 24. Configuring Dashboards

Configure email address

Dashboards are emailed by using the owner's configured email address as the From address.

Note: Before you begin configuring dashboards, verify that you configure a valid email address in the My Settings page. See "My Settings" in the *IBM Tealeaf cxImpact User Manual*.

Alerts and scorecard use system settings to specify the **From** email address.

- See "CX Settings" in the *IBM Tealeaf cxImpact Administration Manual*.

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Configuration options

In the Configuring Dashboard screen, you access the available dashboards and components by using the links on the left side of the page. You can also use them to manage import or export.

Section
Description

Dashboards
Display dashboards that you can edit. The set of available dashboards is the default display for this screen. See "Getting Started."

Note: Tealeaf users and administrators can see any dashboard that they create or that are shared to them.

Components
Click this link to review the available components to add, edit, or remove components from dashboards, or to create new dashboard components from the available templates. See "Components Screen" on page 63.

Set Default Dashboard
After login, select the default dashboard to display in the Dashboards menu. See "Setting the Default Dashboard" on page 89.

Dashboard Schedules
Configure the scheduled execution and delivery options of emailed dashboards. See "Overview" on page 90.

Report Templates
Import or export report templates. See "Managing Report Templates for Dashboards" on page 94.

Getting Started

From the list of available dashboards, you can select the dashboard to edit or create a new one. Available dashboards are listed in the Dashboards tab:

- Plain text - Owned by the current user.
- Bold text - Default dashboard.
- - Shared to the current user, who is defined as a Dashboard Admin for it. User can edit.
- - Shared to the current user, who is defined as a Dashboard User for it. Dashboard Users cannot edit shared dashboards.

Permissions are configured in the Permissions tab.

Field	Description
`Name`	The displayed name of the dashboard.
`Active`	If inactive, you cannot see the dashboard in the Dashboards menu.
`Flags`	Entries in this column indicate whether the dashboard is shared or editable. See the icons.

The following actions are available for dashboards:

Table 9. Getting Started

Button	Command	Description
	View	View the dashboard. See Chapter 4, “Using Dashboards,” on page 51.
	Edit	Configure the dashboard's properties.
	Copy	Create a copy of the dashboard for the current user. • If you are copying a shared dashboard, this command creates an instance of the original for the new owner. • To create an independent instance of the dashboard, select `Duplicate Components`. When this option is selected, the new dashboard is owned independently of the original one. The new dashboard is owned by the current user and has no further association with the original.
	Create	Create a dashboard.
	Delete	Delete the selected dashboard, if owned by the current user. **Note:** Any components that are used by the dashboard are retained and must be deleted separately.

Creating a Dashboard

To create a dashboard:

1. To create a dashboard, click the **Add (** **)** button.
2. Enter the name of the dashboard and click **OK**.
3. The dashboard is saved, and you can begin editing the dashboard in the General tab.
4. Configure properties in each tab:
   - **General** tab
   - **Tabs** tab
   - **Permissions** tab
5. You can save the dashboard at any time. To save it, click **Save**. Changes on all tabs are saved.
6. The configured dashboard is now displayed in the **Dashboards** screen.
7. You can populate the dashboard with components. See “Components Screen” on page 63.

General Tab

Figure 25. General Tab

Property
Description

ID An internal identifier for the dashboard.

Title The user readable name for the dashboard. This name is displayed in the Dashboard screen and the portal menu.

Default Tab
When the dashboard is loaded, the specified tab is selected by default.

Active
If inactive, the dashboard is not displayed in the dashboards menu and cannot be emailed.

Tabs tab

In the **Tabs** tab, you can define the tabs that are displayed in the dashboard. You can use individual tabs to organize dashboard components along common types of information, such as site statistics, visitor activities, or goal conversion.

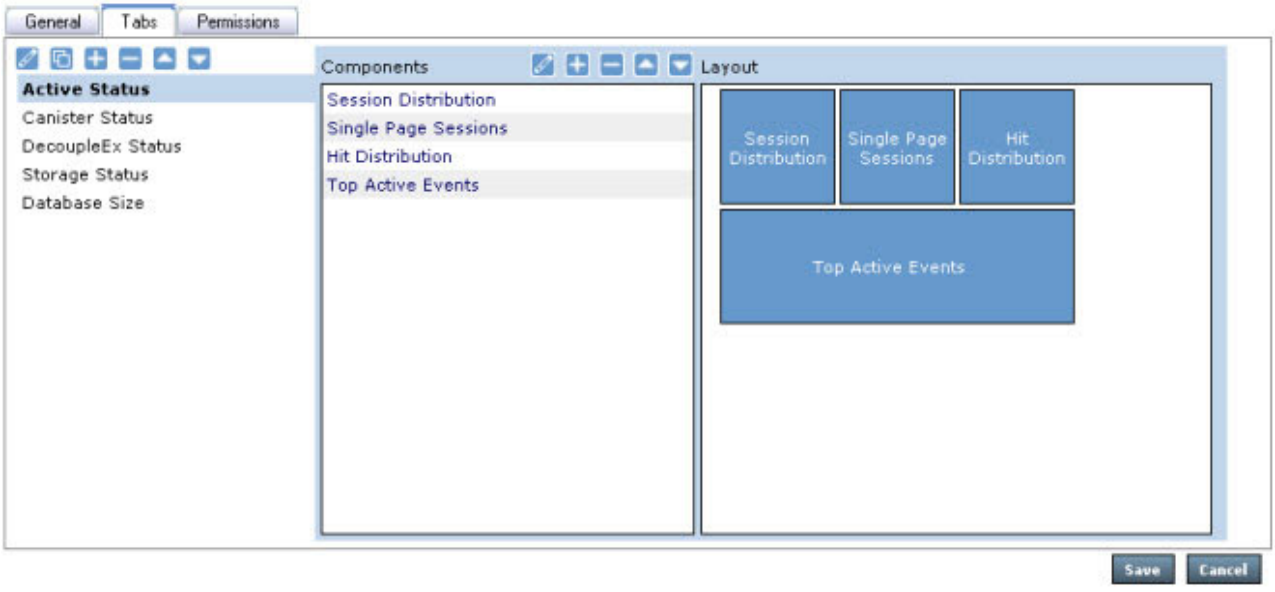

Figure 26. Tabs Tab

Adding and arranging tabs

In the left pane, you can see the available tabs that you create. When you select a tab, the components on the tab are displayed in the middle pane. Right pane contains the current layout for the selected tab.

Following are the command buttons:

Table 10. Adding and arranging tabs

Button	Command	Description
	Edit	Select the tab and click **Edit**to rename it.
	Copy	Click the **Copy**to copy the selected tab. In the dialog, enter a name for the new tab, and select the dashboard to which to copy the tab. Select the check box if you want to copy the components on the selected tab. Click **OK**.
	Create	Enter a name for the new tab, and click **OK**. It is displayed in list of available tabs.
	Delete	Click **Delete** to remove the selected tab.

You can use the Up and Down arrow to reorganize the display order of the tabs in the dashboard.

Organizing components in a tab

For the selected dashboard tab, you can add and remove components in the middle pane and arrange their screen layout in the right pane.

Above the Components pane, the following commands are available:

Table 11. Organizing components in a tab

Button	Command	Description
	Edit	To edit a component, select it and click the Edit button.
	Create	Add a component to the tab from a new or existing component template: **Note:** Before you add a component, review the set of existing component templates to avoid redundancy or creating a template that Tealeaf already provides. • `Existing Component` - Opens the list of available components. To add one of the displayed components to the current tab, select it and click **Select**. You can edit the properties after it is added. • `New Component` - Opens the list of available component templates. To build your new component, select one of the displayed components to the current tab, select it and click **Select**. The Component Properties window is displayed, where you can configure the new component.

Table 11. Organizing components in a tab (continued)

Button	Command	Description
	Delete	Removes the selected component from the tab.

Layout pane

To rearrange the display of the selected components for the tab, use the up and down arrow keys above the **Components** pane. The Layout pane is updated with each change.

- You can add a placeholder item, which reserves space for unfinished dashboard components. Add an existing component from the Basic Components category.

Permissions Tab

Through the **Permissions** tab, you can share dashboards that you create with other user groups. Sharing dashboards is a good way to ensure that everyone in a group is looking at the same content.

- Members of `Admin Group` and `cxView Admin` are automatically defined as administrators of all dashboards, which means that they can see and edit any dashboard in the system. Administration and use rights to a dashboard cannot be removed for these groups.

  Note: To enable the previous groups to assign access to dashboards, you must save a dashboard and reload it. Then, members of the previous groups are automatically assigned as admins and can assign access permissions to the dashboard.
- All Portal users can access the System Status and Technical Site Metrics dashboards, regardless of user or group permissions.

Note: More users can be given administrator permissions to a specified dashboard. However, the creator of the dashboard is always the owner of it and always has administration privileges, even if all Dashboard Admins are removed. Ownership of a dashboard cannot be reassigned.

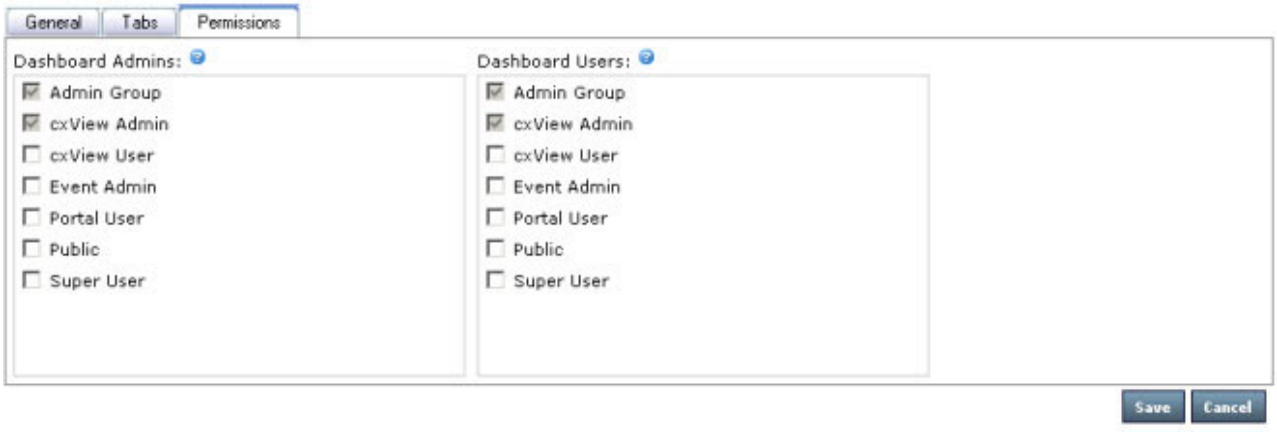

Figure 27. Permissions Tab

To share the dashboard, you can allow selected Tealeaf user groups to be Dashboard Admins or Dashboard Users for the current dashboard.

- Dashboard Admins - Users in these groups can view and edit the dashboard.

Note: Dashboard Admins can accidentally remove their user group from the list, which prevents further editing of the dashboard from those accounts.

- Dashboard Users - The users in these groups can view the dashboard yet are forbidden from editing it.

  Note: The reports that are displayed on the dashboard are subject to the permissions of the group to see it. This is applicable even if a user group has User or Admin access to a dashboard. Reports that are restricted by the group's permissions are not displayed.

Note: Regardless of their permissions to access the dashboard in the Portal, all recipients receive the dashboard snapshot. If they lack permissions to see individual components, those components are hidden from display in the Portal and are blocked in emailed snapshots of the dashboard.

When you create a dashboard, you are automatically assigned as a Dashboard Admin forever.

- To create a personal dashboard that is a variation of an existing one, use the copy button in the Dashboards page. See Creating a Dashboard or Editing a Component.

Note: To view all contents of a dashboard, you must access to the Dashboard menu. You must have permissions to view the specific dashboard and all components inside of it. For example, if the dashboard contains scorecards, you must have permissions to view each scorecard and scorecard feature in the Portal (**Analyze** > **Scorecards**), which is governed by IBM Tealeaf cxView group permissions. The same applies to Report Builder and Top Mover components of dashboards. See "Report Access Permissions" in the *IBM Tealeaf cxImpact Administration Manual*.

Components Screen

Through the **Components** screen, you can configure components and add or remove them from dashboard tabs.

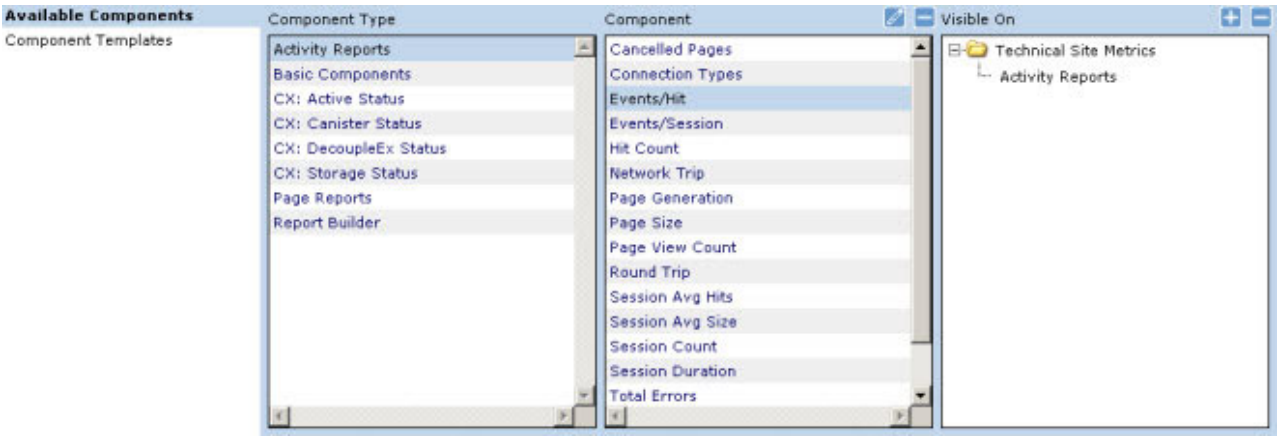

Figure 28. Configuring Components

Select this view of dashboard to verify that important components are well-organized and represented in the appropriate dashboard. The screen is split into four panels:

Component Category
Select from available components or assemble from component templates. Individual components are configured instances of component templates. You can create new components from templates. See "Managing Report Templates for Dashboards" on page 94.

Component Type
Select your component from one of the listed types.

Component
The individual components for the type.

Visible On
The dashboard tabs on which the component is visible.

When you select to review components or component templates, the list of available types is updated. When a Component Type is selected, the list of components of that type is updated in the right pane.

- In the Visible On pane, you can review where the selected component is displayed in the available dashboards and add or remove it as needed.

Adding or Removing Components from a Dashboard

Through the Visible On pane, you can review the dashboard tabs in which the currently selected component is displayed.

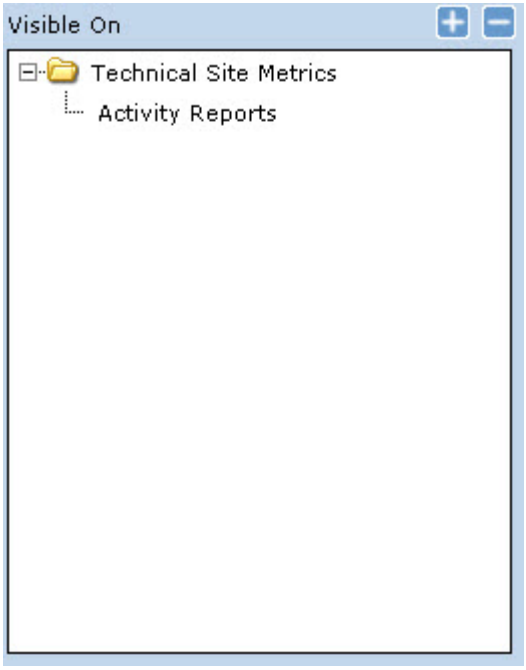

Figure 29. Visible On pane

Dashboard names are displayed as folders. Clicking a dashboard name reveals the individual tabs of that dashboard where the component is displayed.

- To remove a component from a dashboard tab, select it in the Visible On panel. Click the -sign.

To add the selected component to a tab:

1. Select **Available Components**.
2. In the Component Type panel, select the type of component to add. See "Managing Report Templates for Dashboards" on page 94.
3. Select the component in the Component pane.
4. Above the Visible On pane, click the +sign.
5. In the dialog, click the dashboard name to which you want to add the component. The current tabs on the selected dashboard are displayed beneath the dashboard name.
   - To view the dashboard tab names without the dashboard headings, click the **Individually** check box.
   - To filter the view, select the **Filter** check box and enter a filter string with which to filter the display. Wildcards are accepted. The display is updated to show only those items whose name contains the filter string.
6. Click the name of the tab to which you want to add the component.
7. Click **Select**.
8. The Visible On panel is updated.

Adding a report component

You can add charts and tables from reports that you create in the Portal reporting tools. In the categories of components, you can select charts or tables from reports from either of the following sources:

- `Report Builder` contains the set of saved reports that are created through the Tealeaf Report Builder. See "Tealeaf Report Builder" in the *IBM Tealeaf Reporting Guide*.
- `Top Movers` contains the saved Top Mover reports. See "Analyzing Top Movers" in the *IBM Tealeaf Reporting Guide*.

You can add either of the following types of reporting components:

- `Report Chart` - Add the pie, bar, or line chart for the selected report to your dashboard.

  Note: You can add a report chart to your dashboard only if the underlying report can be made into a chart. See "Tealeaf Report Builder" in the *IBM Tealeaf Reporting Guide*.
- `Report Table` - Add the tabular detail data for the selected report to your dashboard.

Optionally, you can edit the configuration for the component.

- See "Tealeaf Report Builder" in the *IBM Tealeaf Reporting Guide*.
- See "Analyzing Top Movers" in the *IBM Tealeaf Reporting Guide*.

Editing a Component

To edit a component:

1. Select **Available Components**.
2. The available types of components are displayed in the Component Type pane. If a component type is selected, the individual components of that type are displayed in the right pane. Select a component type and the individual component of that type to edit.
3. If the component is in use, in the Visible On pane you can see the dashboards and tabs where it is displayed.

4. Above the Component pane, click **Edit**.
5. The Configure Component dialog is displayed. See “Dashboard Component Templates.”
6. Make your changes and click **Save**.

Removing a Component

You can remove components from individual dashboards or delete them from use in the system.

- To remove a template from a dashboard tab, use the **Visible On** pane.

To delete a component, select it in the Component tab. Then, click the **Delete** button at the top of the pane. Confirm that you want to delete the component.

Note: Deleting a component removes it from all dashboard tabs.

- To add a component, you can add an existing component or create it from a component template.

Component Templates

You can use the provided component templates as the basis for creating your own dashboard components.

- See “Dashboard Component Templates.”

Adding a component

To add a component:

1. Click **Component Templates**.
2. Select the **Component Type** and then the component template from which to build the new component.
3. Above the **Component Template** pane, click the +.
4. The Configure Component dialog is displayed. Edit the properties as needed.
5. When you finish configuring it, click **Save** to save the component.
6. The component is now available for review through the list of Available Components. See Creating a Dashboard or Editing a Component for more information.
   - You can add the component to dashboard tabs through the Available Components screen or through the Dashboards screen. See “Getting Started” on page 58.

Dashboard Component Templates

Use a pre-configured set of dashboard component templates to build your suite of dashboard components to include Portal report data in your dashboards. You can find information about the dashboard component templates with their property descriptions.

Accessing Dashboard Component Templates

To access the available dashboard component templates:

1. From the Portal menu, select **Configure** > **Dashboards**.
2. The Dashboards screen is displayed. See Chapter 5, “Configuring Dashboards,” on page 57.

3. In the left navigation panel, click the **Configuration** category.
4. Select the **Components** link.
5. In the main panel, click **Component Templates**.
6. In the Component Type panel in the middle, select the type of component.
7. In the Component panel on the right, select the component template to use as the basis for building your own component.
8. To create a component from the selected template, click the plus**(+)** icon.

Common Dashboard Component Properties

After a component or template is selected, the Configure Componentis displayed, where you can edit the properties of the component:

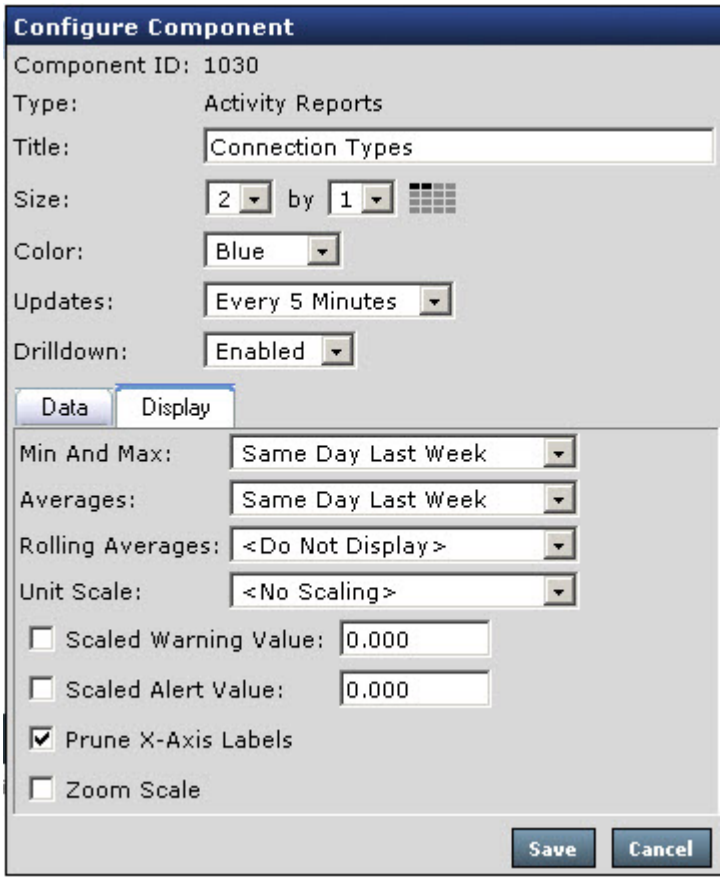

Figure 30. Dashboard Component

Below the common component parameters are the component-specific parameters, split into two sections: **Data** and **Display**.

Note: Some components do not have both data and display parameters. If the parameter type does not apply, the relevant tab is hidden.

To save the component to the dashboard, click **Save**.

Common properties in the Data tab

Property
Description

Component ID
Internal read-only identifier for the component.

Type Component Type to which the component belongs. For more information, see the Dashboard Component Template Types section.

Title The component title, which is displayed on the dashboard.

Size The size of the component, in Portal space units. The small grid to the right of the size inputs indicates the area that is occupied by the component on the page.
Dashboard components can be sized both horizontally and vertically, with a minimum value of 1 and a maximum value of 4 in both directions.

- A dashboard tab can have an unlimited number of rows.

Color The color of the component title bar.

Updates
The update interval for the component.

Note: The component that you add to the dashboard references data from completed sessions only. So configuring an update interval to be more frequent than the interval at which the data collection process is run is not useful. By default, data collection occurs every **5-** minutes. In this case, component updates must not occur more frequently than a 5-minute interval for components that are containing completed session data only. If the component references data from active sessions, you can set the update interval to be more frequent than every**5-** minutes. Depending on the configured component and the number of components in the dashboard, there can be performance impacts.

Drilldown
Available button is displayed in the component title bar. Title bar links the button directly to the full report with the same parameters used to generate the component.

Common properties in the Display tab

Some components do not have a **Display** tab, so there are no common properties in this tab.

Dashboard Component Template Types

In the Component Templates screen, you can review the available component templates by type and create new component instances from them.

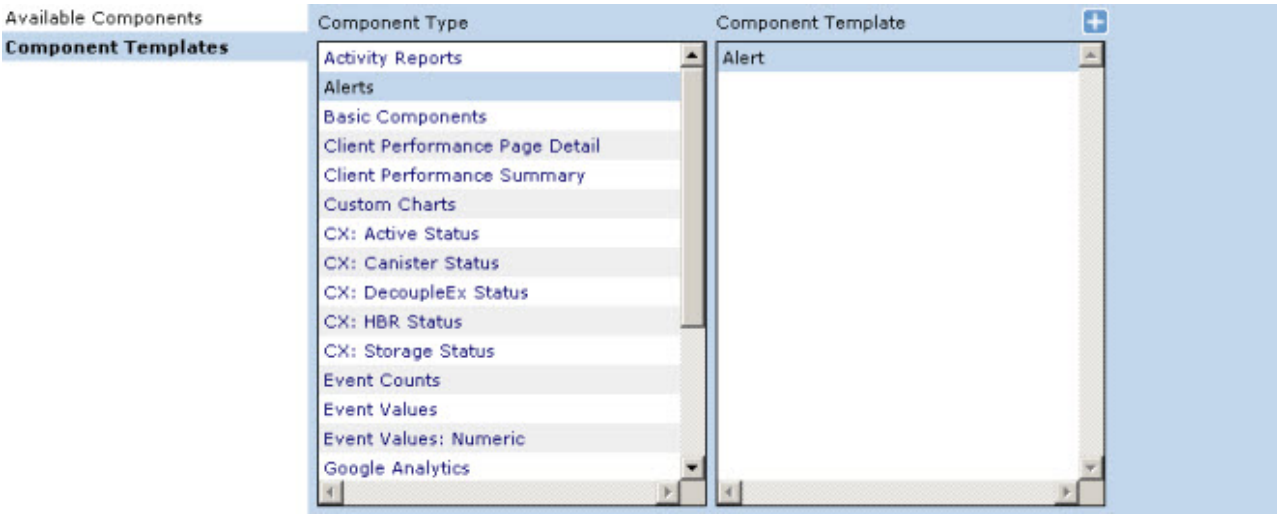

Figure 31. Component Templates Screen

- Component templates can be imported and exported as part of defined reports. See "Importing and Exporting Reports" in the *IBM Tealeaf cxView User Manual*.

The following component type templates are available for using as the basis for creating new templates:

Note: Drill-downs on report data available in the standard report are not available when the report is added as a dashboard component.

Alerts

You can insert charts from alerts onto dashboards.

See "TEM Alerts Tab" in the *IBM Tealeaf Event Manager Manual*.

Common properties

- For more information, see "Common properties in the Data tab" section.

Table 12. Data tab:

Property	Description
`Alert`	Click the link to select an alert whose status is posted in the configured dashboard component.

Table 13. Display tab:

Property	Description
`Chart Style`	Select the style of chart to display in the component: • `Full View` - In Full View, the alert component includes the axis labels, alert title, and units indicators. • `Gallery View` - In Gallery View, only the alert data is displayed.

Table 13. Display tab: (continued)

Property	Description
`Unit Scaling`	As needed, the Y-axis of the chart can be scaled according to the units selected in drop-down. • To disable scaling, select `<No Scaling>`.

Basic Components

In the Basic Components section, you can select basic dashboard components for inclusion in your dashboard.

Available components:

- `Header` is used to segregate dashboard content.
- `Image` is an image URL.

Common properties

- For more information, see "Common properties in the Data tab" section.

Image Basic Component template

Property
Description

`Image URL`
For the image component template, you must specify the URL where the image is located.

Client Performance Page Detail

Page detail dashboard components, as reported from the client.

Note: These reports require the installation and deployment of the UI Capture. See "UI Capture FAQ" in the *IBM Tealeaf UI Capture for Ajax FAQ*.

All Client Performance reports are pre-configured to record URL, Host, App, and Server information. This information is stored in the `URL/Host/App/Server` report group of dimensions, with which each client performance event is automatically associated.

- For more information about this report group, see "TEM Dimensions Tab" in the *IBM Tealeaf Event Manager Manual*.

See "Analyzing Performance" in the *IBM Tealeaf Reporting Guide*.

Table 14. Client Performance Page Detail component templates:

Report Type	Description
`Client Performance Page Detail: Broken Image Times`	Page-level detail on broken images • For more information about the contents of this report, see "Analyzing Performance" in the *IBM Tealeaf Reporting Guide*.
`Client Performance Page Detail: Browser Dimensions`	Page-level detail on browser dimensions • For more information about the contents of this report, see "Analyzing Performance" in the *IBM Tealeaf Reporting Guide*.

Table 14. Client Performance Page Detail component templates: (continued)

Report Type	Description
`Client Performance Page Detail: Client Statistics`	Page-level detail on various statistics, as gathered and computed from client-reported information • For more information about the contents of this report, see "Analyzing Performance" in the *IBM Tealeaf Reporting Guide*.
`Client Performance Page Detail: Dwell Times`	Page-level detail on dwell times • For more information about the contents of this report, see "Analyzing Performance" in the *IBM Tealeaf Reporting Guide*.
`Client Performance Page Detail: JavaScript Alerts`	Page-level detail on JavaScript alerts • For more information about the contents of this report, see "Analyzing Performance" in the *IBM Tealeaf Reporting Guide*.
`Client Performance Page Detail: Render Times`	Page-level detail on render times • For more information about the contents of this report, see "Analyzing Performance" in the *IBM Tealeaf Reporting Guide*.

Common properties

- For more information, see "Common properties in the Data tab" section.

Table 15. Data tab:

Property	Description
`Period`	Select the focus period to display in the component from the drop-down.
`URL`	Optionally, you can pre-filter the displayed data in the component for a specific value of the normalized URL dimension.
`Host`	Optionally, you can pre-filter the displayed data in the component for a specific value of the Host dimension.
`App`	Optionally, you can pre-filter the displayed data in the component for a specific value of the Application dimension.
`Server`	Optionally, you can pre-filter the displayed data in the component for a specific value of the Server dimension.

To apply any of the dimension filters, select the check box next to the name. Click the link to select the value with which to filter the report.

- You can filter the report by using multiple dimensions.
- You cannot filter the report by using multiple values of a single dimension.

Client Performance Summary

Summary report information about client user-interface data, as reported from the client.

Note: These reports require the installation and deployment of UI Capture. See "UI Capture FAQ" in the *IBM Tealeaf UI Capture for Ajax FAQ*.

See "Analyzing Performance" in the *IBM Tealeaf Reporting Guide*.

Table 16. Client Performance Summary component templates:

Report Type	Description
`Client Performance Summary: Broken Image Times`	Summary information about broken images • For more information about contents of this report, see "Analyzing Performance" in the *IBM Tealeaf Reporting Guide*.
`Client Performance Summary: JavaScript Alerts`	Summary information about JavaScript alerts • For more information about contents of this report, see "Analyzing Performance" in the *IBM Tealeaf Reporting Guide*.
`Client Performance Summary: Render Times`	Summary information about render times • For more information about contents of this report, see "Analyzing Performance" in the *IBM Tealeaf Reporting Guide*.

Common properties

- For more information, see "Common properties in the Data tab" section.

Table 17. Data tab:

Property	Description
`Period`	Select the focus period to display in the component from the drop-down.
`Host`	Optionally, you can pre-filter the displayed data in the component for a specific value of the Host dimension.
`Application`	Optionally, you can pre-filter the displayed data in the component for a specific value of the Application dimension.
`Server`	Optionally, you can pre-filter the displayed data in the component for a specific value of the Server dimension.
`Display Others`	When selected, the values for the `[others]` values for the configured dimensions are also displayed in the report.

To apply any of the dimension filters, select the check box next to the name. Click the link to select the value to filter the report.

- You can filter the report by using multiple dimensions.
- You cannot filter the report by using multiple values of a single dimension.

Table 18. Display tab:

Property	Description
`Display`	Select the topmost values to display. • To display the all of the recorded values for the configured report, select `All`.

CX: Active Status

You can add charts and tables from the Active Status report.

See "Monitoring Active Status" in the *IBM Tealeaf cxImpact User Manual*.

Common properties

- For more information, see "Common properties in the Data tab" section.

Table 19. Active Status component templates:

Report Type	Description
Hit Distribution	Distribution of hits across servers in the environment
Session Distribution	Session distribution between single and multi-hit sessions
Single Page Sessions	Percentages of single-hit sessions and stand-alone hits
Top Active Events	Counts of the top active events.

Table 20. Data tab:

Property	Description
Tealeaf CX	Select the server from which the report data is gathered. • To gather data from all servers, select <All Servers>.

Table 21. Display tab:

Property	Description
Unit Scaling	As needed, the Y-axis of the chart can be scaled according to the units selected in drop-down. • To disable scaling, select <No Scaling>.
Scaled Warning Value	Optionally, you can configure a marker to be placed on the chart that is indicating a warning level. Units that are entered in the textbox are based on any applied scaling factor.
Scaled Alert Value	Optionally, you can configure a marker to be placed on the chart that is indicating an alert level. Units that are entered in the textbox are based on any applied scaling factor.

Top Active Events component template

For the Top Active Events dashboard component, the following properties are available.

Table 22. Data tab:

Property	Description
Tealeaf CX	Select the server from which the report data is gathered. • To gather data from all servers, select <All Servers>.
Grouped	Select this check box to group events by event label in the report.
Limit Event Count	When selected, the specified number of top events (Top-N) are tabulated in the report.

Table 23. Display tab:

Property	Description
Display	Select the topmost values to display. • To display the all of the recorded values for the configured report, select All.

CX: Canister Status

The Canister Status dashboard components can be included to provide updated information about the Tealeaf Canisters in your environment.

See "System Status" in the *IBM TealeafcxImpact Administration Manual*.

Common properties

- For more information, see "Common properties in the Data tab" section.

Table 24. Canister Status report types:

Report Type	Description
Active Sessions	Counts of active sessions for the selected Canister • For more information about the contents of this report, see the "Active Sessions component template".
Active Sessions (All)	Counts of active sessions across all Canisters • For more information about the contents of this report, see the "Active Sessions (All) component template".
Canister Memory Used	Currently used memory in the selected Canister • For more information about the contents of this report, see the "Canister Memory Used component template".
CPU Utilization (All)	CPU utilization across all Canisters in the environment • For more information about the contents of this report, see the "CPU Utilization (All) component template".
Session Distribution	Distribution of sessions across all servers in the environment • For more information about the contents of this report, see the "Session Distribution component template".

Active Sessions component template

Table 25. Data tab:

Property	Description
Tealeaf CX	(Active Sessions) Select the server from which the data is gathered.

Table 26. Display tab:

Property	Description
Data Coloring	You can choose whether data is displayed in mono or multi-color format.
Unit Scaling	As needed, the Y-axis of the chart can be scaled according to the units selected in drop-down. • To disable scaling, select <No Scaling>.
Scaled Warning Value	Optionally, you can configure a marker to be placed on the chart that is indicating a warning level. Units that are entered in the textbox are based on any applied scaling factor.
Scaled Alert Value	Optionally, you can configure a marker to be placed on the chart that is indicating an alert level. Units that are entered in the textbox are based on any applied scaling factor.
Show Data Values	Select this option to show the recorded values for data that is displayed in the report.

For more information about the contents of this report, see "System Status" in the *IBM Tealeaf cxImpact Administration Manual*.

Active Sessions (All) component template

Data tab:
None.

Table 27. Display tab:

Property	Description
Data Coloring	You can choose whether data is displayed in mono or multi-color format.
Unit Scaling	As needed, the Y-axis of the chart can be scaled according to the units selected in drop-down. • To disable scaling, select <No Scaling>.
Scaled Warning Value	Optionally, you can configure a marker to be placed on the chart that is indicating a warning level. Units that are entered in the textbox are based on any applied scaling factor.
Scaled Alert Value	Optionally, you can configure a marker to be placed on the chart that is indicating an alert level. Units that are entered in the textbox are based on any applied scaling factor.
Show Data Values	Select this option to show the recorded values for data that is displayed in the report.

For more information about the contents of this report, see "System Status" in the *IBM Tealeaf cxImpact Administration Manual*.

Canister Memory Used component template

Table 28. Data tab:

Property	Description
Tealeaf CX	(Active Sessions) Select the server from which the data is gathered.

Display tab:
None.

For more information about the contents of this report, see "System Status" in the *IBM Tealeaf cxImpact Administration Manual*.

CPU Utilization (All) component template

Data tab:
None.

Table 29. Display tab:

Property	Description
Scaled Warning Value	Optionally, you can configure a marker to be placed on the chart that is indicating a warning level. Units that are entered in the textbox are based on any applied scaling factor.
Scaled Alert Value	Optionally, you can configure a marker to be placed on the chart that is indicating an alert level. Units that are entered in the textbox are based on any applied scaling factor.

For more information about the contents of this report, see "System Status" in the *IBM Tealeaf cxImpact Administration Manual*.

Session Distribution component template

Data tab:
None.

Display tab:
None.

For more information about the contents of this report, see "System Status" in the *IBM Tealeaf cxImpact Administration Manual*.

CX: Database Size

Components of the database Filegroup Size and database Table Size reports provide information about the trends in growth for specific areas of the Tealeaf databases.

- See "System Status" in the *IBM TealeafcxImpact Administration Manual*.
- See "System Status" in the *IBM TealeafcxImpact Administration Manual*.

Table 30. Database Size component templates:

Report Type	Description
`Database Daily Percent Growth`	Percentage growth in database size day over day
`Database Filegroup Size`	Growth of filegroup sizes for the selected database
`Database Table Percent Growth`	Percentage growth in database table size day over day
`Database Table Row Count`	Counts of rows in database tables for all databases

Common properties

- For more information, see "Common properties in the Data tab" section.

Table 31. Data tab:

Property	Description
`Database`	Select the Tealeaf database from which the dashboard component gathers its data.
`Data Group`	(Database Table Percent Growth) Select the data group from which to gather report data.
`Period`	Select the set of preceding days to include in the component's data.

Display tab:
None.

CX: DecoupleEx Status

The components of the DecoupleEx Status report indicate the operational status of the Tealeaf Transport Service and the Short Term Canister.

- If you have product license for IBM Tealeaf cxReveal and install a cxReveal Server, you can optionally display DecoupleEx status information in this report.

- See "System Status" in the *IBM Tealeaf cxImpact Administration Manual*.

Table 32. DecoupleEx Status component templates:

Report Type	Description
Hits/Sec	Report on the hits per second being processed by the selected Canister
Hits/Sec Rate Overview (All)	Summary report on the rate of hits that is processed across all servers
MB/Sec	Megabytes processed per second report
Queue Overview (All)	Overview of the queue performance across all components

Common properties

- For more information, see "Common properties in the Data tab" section.

Table 33. Data tab:

Property	Description
Tealeaf CX	Select the server from which the report data is gathered. • To gather data from all servers, select <All Servers>.
Include Transport Servers	(Hits/Sec Rate Overview (All) and Queue Overview (All)) Select this check box to include data from Transport Servers.
Include cxReveal Servers	(Hits/Sec Rate Overview (All) and Queue Overview (All)) Select this check box to include data from cxReveal search servers.

Table 34. Display tab:

Property	Description
Data Coloring	You can choose whether data is displayed in mono or multi-color format.
Unit Scaling	As needed, the Y-axis of the chart can be scaled according to the units selected in drop-down. • To disable scaling, select <No Scaling>.
Scaled Warning Value	Optionally, you can configure a marker to be placed on the chart that is indicating a warning level. Units that are entered in the textbox are based on any applied scaling factor.
Scaled Alert Value	Optionally, you can configure a marker to be placed on the chart that is indicating an alert level. Units that are entered in the textbox are based on any applied scaling factor.
Show Data Values	Select this option to show the recorded values for data that is displayed in the report.

CX: HBR Status

For Tealeaf systems that use Health-Based Routing to manage Canister load, you can add components of the HBR Status report to your dashboards.

See "System Status" in the *IBM TealeafcxImpact Administration Manual*.

Table 35. HBR Status component templates:

Report Type	Description
Healthy Canisters	Report displaying the overall % of working canisters

Table 35. HBR Status component templates: (continued)

Report Type	Description
Healthy Traffic Distribution	Breakdown report that is showing the traffic distribution and health of each individual canister
Traffic Health	Report displaying the over % of traffic that is being routed to working canisters

Common properties

- For more information, see "Common properties in the Data tab" section.

Table 36. Data tab:

Property	Description
Tealeaf CX	Select the server from which the report data is gathered. • To gather data from all servers, select <All Servers>.

Display tab:
None.

CX: Storage Status

These components provide status information about long-term storage for the Canisters of the environment.

See "System Status" in the *IBM Tealeaf cxImpact Administration Manual*.

Table 37. Storage Status component templates:

Report Type	Description
Avg. Total Index/LSSN Size Per Day	Average total size of the index files per day
Index/LSSN Size Ratio	Ratio of index to LSSN file size
Sessions	Sessions that are stored by day

Common properties

- For more information, see "Common properties in the Data tab" section.

Table 38. Data tab:

Property	Description
Tealeaf CX	Select the server from which the report data is gathered.

Table 39. Display tab:

Property	Description
Data Coloring	You can choose whether data is displayed in mono or multi-color format.
Unit Scaling	As needed, the Y-axis of the chart can be scaled according to the units selected in drop-down. • To disable scaling, select <No Scaling>.

Table 39. Display tab: (continued)

Property	Description
`Scaled Warning Value`	Optionally, you can configure a marker to be placed on the chart that indicates a warning level. Units that are entered in the textbox are based on any applied scaling factor.
`Scaled Alert Value`	Optionally, you can configure a marker to be placed on the chart that indicates an alert level. Units that are entered in the textbox are based on any applied scaling factor.
`Show Data Values`	Select this option to show the recorded values for data that is displayed in the report.

Avg. Total Index/LSSN Size Per Day dashboard component

Data tab:
None.

Table 40. Display tab:

Property	Description
`Byte Scale`	Specify the units for the report (for example bytes, kilobytes).
`Scaled Warning Value`	Optionally, you can configure a marker to be placed on the chart that is indicating a warning level. Units that are entered in the textbox are based on any applied scaling factor.
`Scaled Alert Value`	Optionally, you can configure a marker to be placed on the chart that is indicating an alert level. Units that are entered in the textbox are based on any applied scaling factor.

Live Event Counts

Dashboard components that are created from events that are configured to capture minute-level event counts.

- You cannot select Canister events or events that are not configured to be Searchable & Reportable for these dashboard components.
- Data is available for live event counts for the preceding 24-hour rolling period.
- Minute-level tabulation of event counts requires enabled Alert Service and at least one alert is configured and active.
  - If the Alert Service is stopped or restarted, all data from the preceding 24-hour period is lost. When the Alert Service resumes, it immediately calculates minute-level data.
  - For more information about enabling the alert service, see "Configuring the Alert Service" in the *IBM Tealeaf CX Configuration Manual*.
  - For more information about configuring alerts, see "TEM Alerts Tab" in the *IBM Tealeaf Event Manager Manual*.
- For more information about configuring events to capture minute-level counts, see "TEM Events Tab" in the *IBM Tealeaf Event Manager Manual*.

Common properties

- For more information, see "Common properties in the Data tab" section.

Table 41. Data tab:

Property	Description
Event	Select the event whose minute-by-minute counts you would like to display. • The event must be configured to tabulate minute-by-minute counts. See "TEM Events Tab" in the *IBM Tealeaf Event Manager Manual*.
Period	Select the period over which to display the minute-by-minute event counts.

Table 42. Display tab:

Property	Description
Data View	Select the type of graph to use to display the report data.
Unit Scale	As needed, the Y-axis of the chart can be scaled according to the units selected in the drop-down. • To disable scaling, select <No Scaling>.
Scaled Warning Value	Optionally, you can configure a marker to be placed on the chart that is indicating a warning level. Units that are entered in the textbox are based on any applied scaling factor.
Scaled Alert Value	Optionally, you can configure a marker to be placed on the chart that is indicating an alert level. Units that are entered in the textbox are based on any applied scaling factor.
Zoom Scale	When selected, the Y-axis scale is automatically zoomed for the Tealeaf user.

Performance Reports

Dashboard components that are derived from system performance reports.

See "Analyzing Performance" in the *IBM Tealeaf Reporting Guide*.

Table 43. Performance Reports component templates:

Report Type	Description
Response Time Trend	Response time trending report
Segmented Response Time	Segment response times for page generation, network trip, and render times
Top Pages	Top performing pages

Common properties

- For more information, see "Common properties in the Data tab" section.

Table 44. Data tab:

Property	Description
Period	Select the focus period to display in the component from the drop-down.
URL	Optionally, you can pre-filter the displayed data in the component for a specific value of the normalized URL dimension.

Table 44. Data tab: (continued)

Property	Description
`Host`	Optionally, you can pre-filter the displayed data in the component for a specific value of the Host dimension.
`App`	Optionally, you can pre-filter the displayed data in the component for a specific value of the Application dimension.
`Server`	Optionally, you can pre-filter the displayed data in the component for a specific value of the Server dimension.
`Display Others`	(Segmented Response Time and Top Pages) When selected, the values for the `[others]` values for the configured dimensions are also displayed in the report.
`Display Render Times`	When selected, render times are also displayed in the report.

Table 45. Display tab:

Property	Description
`Display`	(Segmented Response Time and Top Pages) Select the topmost values to display. • To display the all of the recorded values for the configured report, select `All`.

Report Builder

You can include charts and data tables from reports to which you have access in Report Builder.

- See "Tealeaf Report Builder" in the *IBM Tealeaf Reporting Guide*.
- For more information about the visitor Report Builder, see "Tealeaf Visitor Report Builder" in the *IBM Tealeaf cxResults User Manual*.

Table 46. Report Builder component templates:

Report Type	Description
`Report Chart`	Report Builder report in chart format
`Report Chart (Visitor Segment)`	Visitor Report Builder report in chart format
`Report Table`	Report Builder report in table format
`Report Table (Visitor Segment)`	Visitor Report Builder report in table format

Common properties

- For more information, see "Common properties in the Data tab" section.

Report Builder component template

Table 47. Data tab:

Property	Description
`Report`	Select the Report Builder report to include in the dashboard component.
`Period`	Select the focus period to display in the component from the drop-down.

Display tab:
None.

Visitor Report Builder component template

Table 48. Data tab:

Property	Description
Report	Select the Visitor report to include in the dashboard component.
Visitor Segment	When selected, you can configure the source segment for the report.
Visitor Search Schedule	When selected, you can configure the scheduled search to use to generate the source segment.

Display tab:
None.

Scorecards: KPI

You can add any Key Performance Indicator scorecard to which you have access to your dashboards.

See “Overview” on page 24.

Table 49. Scorecards: KPI component templates:

Report Type	Description
Scorecard: KPI	KPI scorecard report.
Scorecard: KPI (Visitor Segment)	KPI scorecard report on a visitor segment.

Common properties

- For more information, see "Common properties in the Data tab" section.

KPI Scorecard report template

Table 50. Data tab:

Property	Description
Scorecard	Click the link to select a scorecard to display in the component.
Period	From the drop-down, select the period to display. Period is relative to the date configured for the dashboard.
Comparison	To include comparison data in the scorecard, select Previous Period. • To disable a comparison period, select No Comparison.

Table 51. Display tab:

Property	Description
Grade Distribution Chart	Select this option to include a grade distribution chart. **Note:** As part of the scorecard definition, Grades must be assigned. For more information about scorecard grading, see “Overview” on page 24.

Table 51. Display tab: (continued)

Property	Description
Grade Detail Table	Select this option to include a grade distribution table. **Note:** As part of the scorecard definition, Grades must be assigned. For more information about scorecard grading, see "Overview" on page 24.

Visitor KPI Scorecard report template

Table 52. Data tab:

Property	Description
Visitor Segment	When selected, you can configure the source segment for the report.
Visitor Search Schedule	When selected, you can configure the scheduled search to use to generate the source segment.

Table 53. Display tab:

Property	Description
Grade Distribution Chart	Select this option to include a grade distribution chart. **Note:** As part of the scorecard definition, Grades must be assigned. For more information about scorecard grading, see "Overview" on page 24.
Grade Detail Table	Select this option to include a grade distribution table. **Note:** As part of the scorecard definition, Grades must be assigned. For more information about scorecard grading, see "Overview" on page 24.

Scorecards: Process

You can add any Process scorecard to which you have access to your dashboards.

See "Configuring Process Scorecards" on page 31.

Table 54. Scorecards: Process component templates:

Report Type	Description
Scorecard: Process	Process scorecard report.
Scorecard: Process (Visitor Segment)	Process scorecard report on a visitor segment.

Common properties

- For more information, see "Common properties in the Data tab" section.

Process Scorecard dashboard component

Table 55. Data tab:

Property	Description
Scorecard	Click the link to select a scorecard to display in the component.
Period	From the drop-down, select the period to display. Period is relative to the date configured for the dashboard.

Table 55. Data tab: (continued)

Property	Description
Comparison	To include comparison data in the scorecard, select Previous Period. • To disable a comparison period, select No Comparison.

Table 56. Display tab:

Property	Description
Summary Metrics	Includes summary metrics in dashboard component. See Chapter 2, "Using Scorecards," on page 5.
Rate Indicators Chart	Includes Rates in chart form in dashboard component. See Chapter 2, "Using Scorecards," on page 5.
Rate Indicators Table	Includes Rates in table form in dashboard component. See Chapter 2, "Using Scorecards," on page 5.
Step Conversion Chart	Includes Step Conversion in chart form in dashboard component. See Chapter 2, "Using Scorecards," on page 5.
Step Conversion Table	Includes Step Conversion in table form in dashboard component. See Chapter 2, "Using Scorecards," on page 5.
Abandonment Chart	Includes Abandonment in chart form in dashboard component. See Chapter 2, "Using Scorecards," on page 5.
Abandonment Table	Includes Abandonment in table form in dashboard component. See Chapter 2, "Using Scorecards," on page 5.
Failure Chart	Includes Failure in chart form in dashboard component.
Failure Table	Includes Failure in table form in dashboard component.

Visitor Process Scorecard dashboard component

Table 57. Data tab:

Property	Description
Scorecard	Click the link to select a scorecard to display in the component.
Period	From the drop-down, select the period to display. Period is relative to the date configured for the dashboard.
Comparison	To include comparison data in the scorecard, select Previous Period. • To disable a comparison period, select No Comparison.

Display tab:
For more information about these properties, see **Display** tab in the previous section.

Top Movers

Dashboard components for top mover reports that you select.

See "Analyzing Top Movers" in the *IBM Tealeaf Reporting Guide*.

Table 58. Top Movers component templates:

Report Type	Description
Top Movers Chart	Top Movers report in chart format

Table 58. Top Movers component templates: (continued)

Report Type	Description
Top Movers Table	Top Movers report in table format

Common properties

- For more information, see "Common properties in the Data tab" section.

Table 59. Data tab:

Property	Description
Report	Click the link to select a Top Movers report to include in the dashboard component.
Hour	If the selected report is an Hourly report, then you can configure the hour of report data to include in the dashboard component.

Display tab:
None.

User Activity Reports

Tealeaf provides a pre-configured set of reports on user activities in the Tealeaf system.

See "Monitoring User Activity" in the *IBM Tealeaf cxImpact Administration Manual*.

Table 60. User Activity component templates:

Report Type	Description
Replay Use	Number of replays per user group. • For more information about the contents of this report, see "Monitoring User Activity" in the *IBM Tealeaf cxImpact Administration Manual*.
Search Effectiveness	Effectiveness of user searches in locating sessions • For more information about the contents of this report, see "Monitoring User Activity" in the *IBM Tealeaf cxImpact Administration Manual*.
Sessions Replayed	Number of sessions that are replayed by user group • For more information about the contents of this report, see "Monitoring User Activity" in the *IBM Tealeaf cxImpact Administration Manual*.
Sessions Returned	Number of sessions that are returned by user group • For more information about the contents of this report, see "Monitoring User Activity" in the *IBM Tealeaf cxImpact Administration Manual*.
Usage Metrics By User	Summary of usage statistics individual user. • For more information about the contents of this report, see "Monitoring User Activity" in the *IBM Tealeaf cxImpact Administration Manual*.
Usage Metrics Summary	Summary of Tealeaf usage metrics by user group. • For more information about the contents of this report, see "Monitoring User Activity" in the *IBM Tealeaf cxImpact Administration Manual*.

Table 60. User Activity component templates: (continued)

Report Type	Description
Usage Metrics Summary Detail	Detail version of the previous report.
User Inactivity	Usage report on Tealeaf user accounts that is accessed recently. • For more information about the contents of this report, see "Monitoring User Activity" in the *IBM Tealeaf cxImpact Administration Manual*.
User Searches	Summary of searches by user group • For more information about the contents of this report, see "Monitoring User Activity" in the *IBM Tealeaf cxImpact Administration Manual*.

Common properties

- For more information, see "Common properties in the Data tab" section.

Table 61. Data tab:

Property	Description
Period	From the drop-down, select the period to display. Period is relative to the date configured for the dashboard.
User Groups	Select the user groups to include in the report. • To include data for all user groups, select <All User Groups>.
Aggregate To Period	Select this option to aggregate all reporting data to the selected period.

Table 62. Display tab:

Property	Description
X-Label Orientation	Choose the axis orientation of labels that are displayed for the X-axis: Horizontal or Vertical.
Unit Scale	As needed, the Y-axis of the chart can be scaled according to the units selected in drop-down. • To disable scaling, select <No Scaling>.
Scaled Warning Value	Optionally, you can configure a marker to be placed on the chart that is indicating a warning level. Units that are entered in the textbox are based on any applied scaling factor.
Scaled Alert Value	Optionally, you can configure a marker to be placed on the chart that is indicating an alert level. Units that are entered in the textbox are based on any applied scaling factor.
Prune X-Axis Labels	Optionally, the scorecard can be allowed to automatically prune X-axis labels that are too large for the available display space.
Zoom Scale	When selected, the Y-axis scale is automatically zoomed for the Tealeaf user.

Usage Metrics report components

Table 63. Data tab:

Property	Description
Period	From the drop-down, select the period to display. Period is relative to the date configured for the dashboard.

Table 63. Data tab: (continued)

Property	Description
User Groups	Select the user groups to include in the report. • To include data for all user groups, select <All User Groups>.

Display tab:
None.

User Inactivity report component

Table 64. Data tab:

Property	Description
Period	From the drop-down, select the period to display. Period is relative to the date configured for the dashboard.
User Groups	Select the user groups to include in the report. • To include data for all user groups, select <All User Groups>.
Portal Events	You can select one or more portal application events that are used to track user activities to be included in the dashboard component. • If a list of Portal events is supplied, the selected users are checked to see whether they do not complete any of the specified events. – If a list is not supplied, the selected users are evaluated for failing to complete any of the monitored portal activities. • To add a portal event to the dashboard component, click the **Plus** (+) icon. • To delete a portal event to the dashboard component, click the **Minus** (-) icon.

Display tab:
None.

Visitor Segment Reports

Components from visitor reports for specific segments or schedules.

See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.

Table 65. Visitor Segment Reports component templates:

Report Type	Description
Page Counts	Number of pages in the segment by date • See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.
Pages by Hour	Number of pages in the segment for each hour of the reporting period • See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.
Search Term Session Matches	Counts of session matches for each search term parameter • See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.

Table 65. Visitor Segment Reports component templates: (continued)

Report Type	Description
`Search Term Visitor Matches`	Counts of visitor matches for each search parameter • See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.
`Session Length Distribution`	Distribution of session lengths across the reporting period
`Session Page Count Distribution`	Distribution of counts of pages across sessions in the segment • See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.
`Sessions by Hour`	Counts of sessions for each hour of the reporting period • See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.
`Sessions Counts`	Session counts across dates in the reporting period • See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.
`Top Entry Pages`	Counts of most common entry pages for sessions in the segment • See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.
`Top Events`	Counts of most common events for sessions in the segment
`Top Exit Pages`	Counts of most common exit pages for sessions in the segment • See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.
`Top Logins`	Counts of most common login identifiers for sessions in the segment • See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.
`Top Session Referrer`	Counts of most common referrers for sessions in the segment • See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.
`Top Visitors`	Counts of most common visitors for sessions in the segment • See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.
`User Def 1 Values`	Counts of values that are stored in `Session Attribute 00` for sessions in the segment • `User Def` is an existing term from Release 7.x and earlier. • See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.
`User Def 2 Values`	Counts of values that are stored in `Session Attribute 01` for sessions in the segment • `User Def` is an existing term from Release 7.x and earlier. • See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.
`User Def 3 Values`	Counts of values that are stored in `Session Attribute 02` for sessions in the segment • `User Def` is an existing term from Release 7.x and earlier. • See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.

Table 65. Visitor Segment Reports component templates: (continued)

Report Type	Description
`User Def 4 Values`	Counts of values that are stored in `Session Attribute 03` for sessions in the segment • `User Def` is an existing term from Release 7.x and earlier. • See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.

Common properties

- For more information, see "Common properties in the Data tab" section.

Table 66. Data tab:

Property	Description
`Visitor Segment`	When selected, you can configure the source segment for the report.
`Visitor Search Schedule`	When selected, you can configure the scheduled search to use to generate the source segment.
`Scope`	Defines the scope of the report: • `Only matching sessions per visitor` - returns for each visitor only session from the segment in the specified time frame • `All sessions per visitor` - include for each visitor all sessions from the segment that actively match the specified search criteria • See "Analyzing Visitor Segments" in the *IBM Tealeaf cxResults User Manual*.
`Aggregate Dates`	When selected, data is aggregated in the dashboard component at the day level. • Hourly reports and Distribution reports do not have this option.
`Zero Fill Dates`	When selected, dates that do not contain data are filled with zeros. • Distribution reports do not have this option.
`Report Count`	For Top reports and User Def reports, you can select how the counts are tabulated: • `Report specific` - Counts are tabulated specific to the selected report. • `By visitor` - Counts are tabulated by detected visitor in the segment. • `By session` - Counts are tabulated by session in the segment. • This option is available for Top reports and User Def reports only. The Top Visitors report does not include this option, since it is tabulated by visitor.

Display tab:
None.

Setting the Default Dashboard

From the dashboards available to you, you can select the dashboard to display as your personal default in the Dashboards menu.

1. In the Configuring Dashboards page, click the **Set Default Dashboard** link.
2. In the**Dashboards** drop-down, select the dashboard that you like to display at the top of the Dashboards menu.

3. Click **OK**.
4. When you next log in, this dashboard is displayed at the top of the dashboards menu.
   - To refresh the portal menu, click the**Refresh** button on your browser.

Tealeaf administrators can configure this dashboard to be the startup page for your account. The start page can be configured at the individual user or group level by a Tealeaf administrator.

- See "CX User Administration" in the *IBM Tealeaf cxImpact Administration Manual*.
- See "cxReveal User Administration" in the *IBM Tealeaf cxReveal Administration Manual*.
- See "cxView User Administration" in the *IBM Tealeaf cxImpact Administration Manual*.

Overview

After you create dashboards, you can configure the execution of snapshots of dashboards on a daily, weekly, or monthly basis for a selected day. These reports are delivered to specified email addresses or aliases at the time of execution in PDF or HTML.

Note: You cannot email snapshots of inactive dashboards.

Note: To email report snapshots, you must configure an email address in your user account. Do not create snapshot schedules from a Tealeaf administration account.

- See "My Settings" in the *IBM Tealeaf cxImpact User Manual*.

Note: Non-administrator users can configure report schedules for reports that they own or are shared to them. The Tealeaf admin can see and configure all schedules.

- For more information about configuring access permissions for reports, see "Report Access Permissions" in the *IBM Tealeaf cxImpact Administration Manual*.
- To configure dashboard schedules, click **Dashboard Schedules** in the left pane.

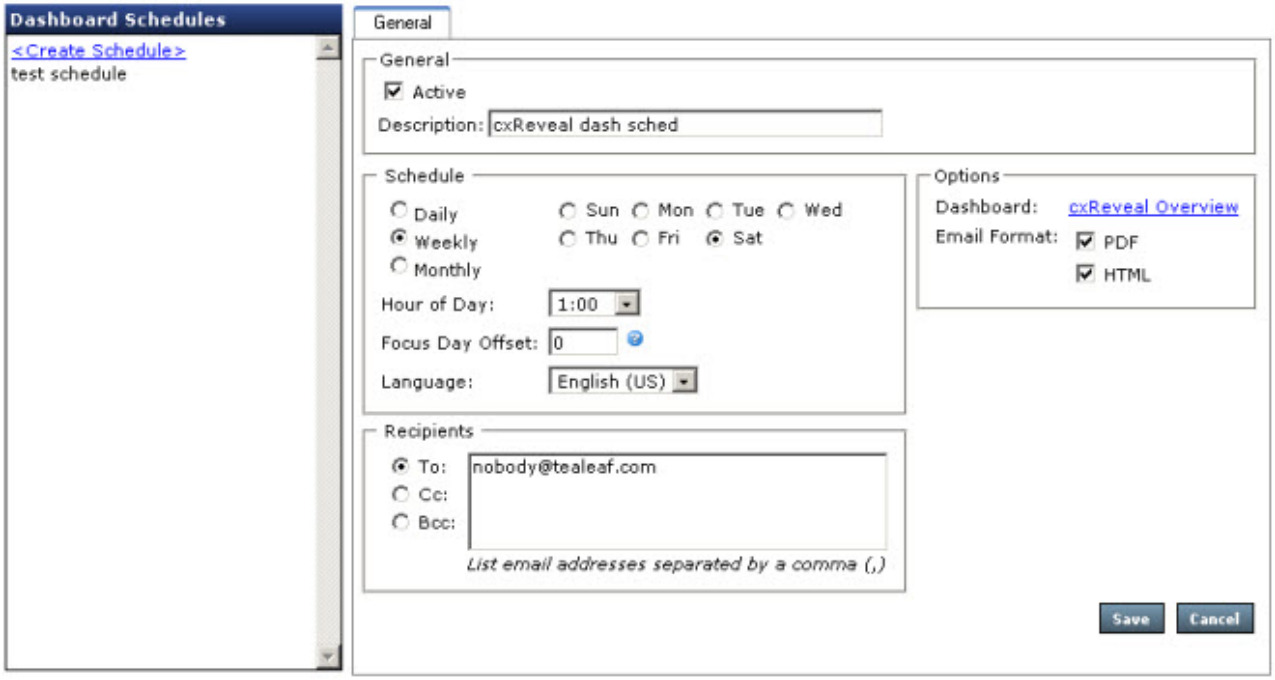

Figure 32. Dashboard Schedules

Note: A dashboard schedule is visible only to the owner of the schedule.

- To configure a new dashboard schedule, click **<Create Schedule>**.
- To edit an existing schedule, select it in the middle pane. The schedule is displayed in the **General** tab.
- To disable a schedule, select it and then clear the **Active**check box in the **General** tab.

General Tab

To configure a new or existing schedule, specify the properties in the General tab.

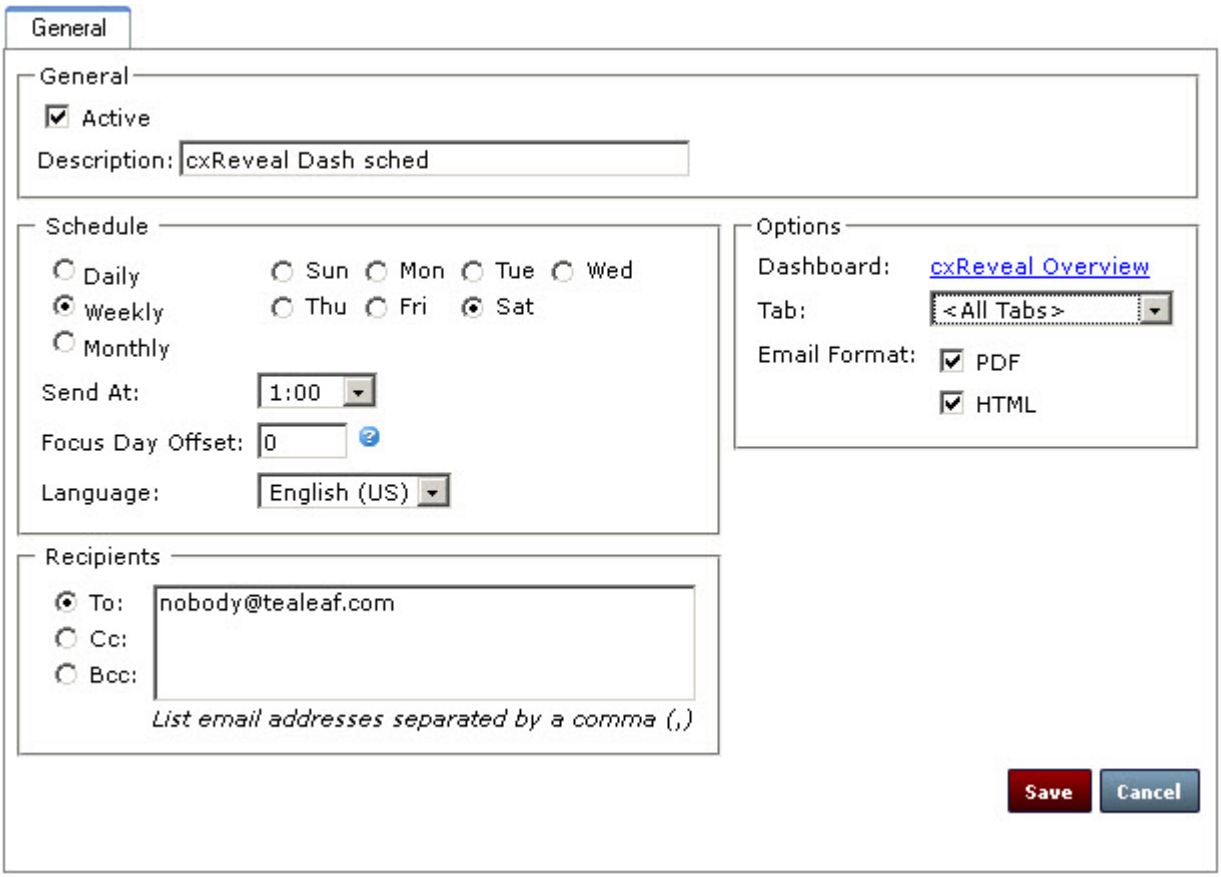

Figure 33. Dashboard Schedules - General Tab

Properties

Description

Active

Click the check box to enable the dashboard schedule.

Description

This description is displayed in the Portal.

Schedule

Schedule the dashboard by type:

- **Daily** - Select the days of the week when the dashboard is to be processed.
- **Weekly** - Select the single day of the week when the dashboard is to be processed.
- **Monthly** - From the drop-down, select the day of the month when the dashboard is to be processed.

Send At

Select the time when the dashboard is processed and delivered.

- Time is based on the Tealeaf system time zone. See "Configuring the System Timezone" in the *IBM Tealeaf CX Configuration Manual*.

Focus Day Offset

Optionally, you can configure the number of days before the date of execution that you would like to define as "today" in the dashboard. For

example, you might configure a dashboard to be processed Tuesday morning to delivers Monday's data to users. In this case, you would set the offset value to 1.

Language
Select the language to use in the dashboard from the drop-down.

Recipients
Enter a comma-separated list of email addresses or aliases to whom to send the dashboard.

Dashboard
Click the link to select the dashboard to send. Select the dashboard and click **Select**.

Tab Optionally, you can configure the schedule to deliver the contents of a single tab in the dashboard.

- To deliver all tabs in the scheduled dashboard, select `<All Tabs>`.

Email Format
Select the format in which to send the dashboard: `PDF`, `HTML` or both.

History Tab

In the **History** tab, you can review the history of scheduled dashboard executions.

Created At	Scheduled At	Log Level	Message
06/12/2010 18:00:13	06/12/2010 18:00:00	5	Schedule process time: 12 Seconds 216 Milliseconds
06/12/2010 18:00:23	06/12/2010 18:00:00	5	Schedule process time: 19 Seconds 312 Milliseconds
06/13/2010 01:00:07	06/13/2010 01:00:00	5	Schedule process time: 7 Seconds 308 Milliseconds
06/13/2010 01:00:21	06/13/2010 01:00:00	5	Schedule process time: 18 Seconds 15 Milliseconds
06/13/2010 03:00:08	06/13/2010 03:00:00	1	An error occured while generating the HTML Dashboard.The application relative virtual path '~/css/portal.css' cannot be made absolute, because the path to the application is not known.
06/13/2010 03:00:18	06/13/2010 03:00:00	5	Schedule process time: 16 Seconds 687 Milliseconds
06/14/2010 03:00:07	06/14/2010 03:00:00	1	An error occured while generating the HTML Dashboard.The application relative virtual path '~/css/portal.css' cannot be made absolute, because the path to the application is not known.
06/14/2010 03:00:16	06/14/2010 03:00:00	5	Schedule process time: 15 Seconds 281 Milliseconds
06/15/2010 03:00:08	06/15/2010 03:00:00	1	An error occured while generating the HTML Dashboard.The application relative virtual path '~/css/portal.css' cannot be made absolute, because the path to the application is not known.

Figure 34. Dashboard Schedules - History Tab

Column
Description

Created At
Time stamp for when the schedule was created

Scheduled At
Time stamp for when the schedule's next execution.

Log Level
Success or failure of the scheduled report

Message
Detail message on status of report execution

Managing Report Templates for Dashboards

In the Report Templates section, you can choose to begin import or export of a dashboard template. A report template includes the base container for the template, specified components, and the required events to populate the dashboard with data.

During import, you can selectively choose which elements of the dashboard to include.

- To import a dashboard, click **Import Template**.
- To export a dashboard, select a dashboard and click **Export Template**. Dashboards are exported in `.tlt` format.
- See "Importing and Exporting Reports" in the *IBM Tealeaf cxView User Manual*.

Chapter 6. Importing and Exporting Reports

Through the Tealeaf Portal, you can export report data in PDF or HTML format for delivery to designated addresses. You can also export report templates that contain scorecards, dashboards, or Tealeaf reports for use in other Tealeaf systems.

Exporting Report Data

For individual reports, you can export them on demand or according to a schedule you define. Use the following links to access information about export of individual reports.

Table 67. Exporting Report Data

Report Type	On-Demand Export	Scheduled Export
Report Builder report	"Tealeaf Report Builder" in the *IBM Tealeaf Reporting Guide*	"Tealeaf Report Builder" in the *IBM Tealeaf Reporting Guide*
Top Movers report	"Analyzing Top Movers" in the *IBM Tealeaf Reporting Guide*	"Analyzing Top Movers" in the *IBM Tealeaf Reporting Guide*
Scorecard	"Using Scorecards" in the *IBM Tealeaf cxView User Manual*	"Configuring Scorecards" in the *IBM Tealeaf cxView User Manual*
Dashboard	"Using Dashboards" in the *IBM Tealeaf cxView User Manual*	"Configuring Dashboards" in the *IBM Tealeaf cxView User Manual*

Report Templates

Report templates are report definitions that can be passed between Tealeaf environments. Through the Portal, you can export the report templates for scorecards, dashboards, and Report Builder reports.

- See Chapter 7, “Exporting Report Templates,” on page 97.
- See Chapter 8, “Importing Report Templates,” on page 99.

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Chapter 7. Exporting Report Templates

Through the Portal, you can export scorecard templates, dashboard templates, and templates for Report Builder types for use in other Tealeaf systems. This feature enables easy migration of reports in development from your test environments to your production environment.

Limitations

The following limitations apply to importing report templates:

1. If an item in a report, such as an event, dimension, or the report itself exists in the destination system, it is used as-is and is not updated. This comparison is based on internal identifiers, instead of display names.
2. The report import feature does not provide full support for any scorecards or reports that reference specific dimension values.
3. You cannot remap events that are used by a report during the import process.
4. You cannot map a report template that is imported to an existing report in the destination system. If five template imports reference a single report, they reference the single instance that is created by the first template import.

   Note: After you import a report template, you cannot re-import it to overwrite the previous version. You must delete the report in the destination system before you attempt to re-import it.

Recommended Workflow

If you are attempting to migrate reports, scorecards, and dashboards from one system to another, Tealeaf recommends the following workflow.

1. Create Report Builder reports with all of the events you want to migrate.
   - These reports must contain events that are used by any dashboards or scorecards that you want to migrate.
   - These reports do not have to be actively used in your Tealeaf environment; the purpose of creating these reports is to bundle up sets of events, which are migrated with the report.
2. Export all Report Builder report templates that you want to migrate or that contain events you want to migrate. Follow the Export Template Steps below.
3. Import them into the destination system. See "Importing Report Templates" in the *IBM Tealeaf cxView User Manual*.
4. Verify that the events and related event objects are properly imported.
5. In the source system, you can choose to export scorecards and dashboards. Follow the Export Template Steps.

   Note: Tealeaf recommends re-creating scorecards and dashboards in the destination system. However, in some cases, it can be problematic to do so. Issues can occur during the import of these items, which do not affect the events that are already imported through Report Builder reports.
6. Import them into the destination system. See "Importing Report Templates" in the *IBM Tealeaf cxView User Manual*.

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Export Template Steps

To export:

1. Go to the appropriate configuration page:
   - To export a scorecard, select **Configure** > **Scorecards** in the Portal menu.
   - To export a dashboard, select **Configure** > **Dashboards** in the Portal menu.
   - To export a Report Builder report or Tealeaf report, select **Configure** > **Report Manager** in the Portal menu.
2. Click the**Report Templates** category.
   - For scorecards and dashboards, you must select the item to export.
3. Then, click **Export Template**.
   - For Report Builder reports, the Report Select dialog is displayed. Select the report or reports that you want to export.
4. Click **Select**.
5. Click **Save**. The report template is saved to your local system.

   Note: Scorecard and report templates are exported in `.tlt` format, which is a proprietary format of Tealeaf.

Chapter 8. Importing Report Templates

Exported or downloaded report templates can be imported into your Tealeaf system.

- Scorecards must be customized to meet individual requirements of the system on which they are installed. After you import a scorecard, you can add, delete, or modify the events that trigger them.
- During import, the event creation process attempts to use existing event definitions on the destination system, including events that were previously created as a part of the current import process.
  - For scorecards and dashboards, regardless of how the original events were used in the source template, if any of those events are exact duplicates except for their names, the event on the destination system will be used whenever event definitions between the source and destination systems are determined to be exact matches.
  - For Report Builder reports, the logic is improved to selectively import events. For this reason, Tealeaf recommends exporting and importing Report Builder reports first.
  - Dependent objects in the report are displayed during the import process.
- Schedules cannot be exported and imported, as the scheduling information can not be valid for the system to which it was imported.

Limitations

The following limitations apply to importing report templates:

1. If an item in a report, such as an event, dimension, or the report itself exists in the destination system, it is used as-is and is not updated. This comparison is based on internal identifiers, instead of display names.
2. The report import feature does not provide full support for any scorecards or reports that reference specific dimension values.
3. You cannot remap events that are used by a report during the import process.
4. You cannot map a report template that is imported to an existing report in the destination system. If five template imports reference a single report, they reference the single instance that is created by the first template import.

   Note: After you import a report template, you cannot re-import it to overwrite the previous version. You must delete the report in the destination system before you attempt to re-import it.

Import Template Steps

To import:

Note: The ability to import report templates is governed by the `Default Allow Report Template Import` permission at the group level and the `Allow Report Template Import` permission at the individual user level. See "CX User Administration" in the *IBM Tealeaf cxImpact Administration Manual*.

1. Go to the report configuration page:
   - To import a scorecard, select **Configure** > **Scorecards** in the Portal menu.

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- To import a dashboard, select **Configure** > **Dashboards** in the Portal menu.
- To import a custom report, select **Configure** > **Report Manager** in the Portal menu.

2. Click the **Report Templates** category.
3. Click **Import Template**.
4. Click **Browse...**.
5. Go to your local environment to select the `.tlt` file to import. Then, click **Open**.
6. To upload the template, click **OK**.
7. The Import Objects dialog is displayed:

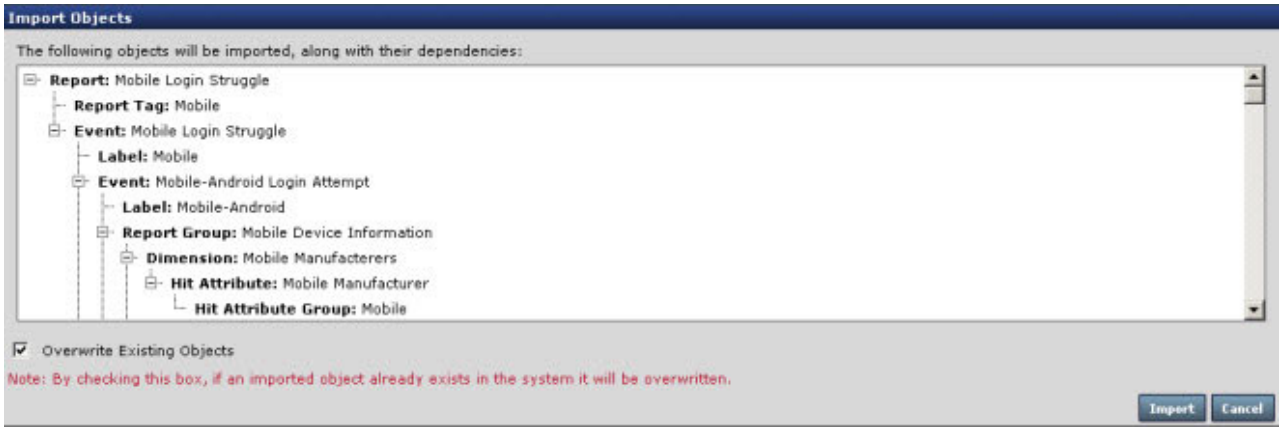
Import Objects
The following objects will be imported, along with their dependencies:
Report: Mobile Login Struggle
Report Tag: Mobile
Event: Mobile Login Struggle
Label: Mobile
Event: Mobile-Android Login Attempt
Label: Mobile-Android
Report Group: Mobile Device Information
Dimension: Mobile Manufacterers
Hit Attribute: Mobile Manufacturer
Hit Attribute Group: Mobile
Overwrite Existing Objects
Note: By checking this box, if an imported object already exists in the system it will be overwritten.
Import
Cancel

Figure 35. Import Objects dialog

- You can expand the top-level node of any object to display its dependencies. Dependent objects are also imported.
- To overwrite any objects in the destination system that share internal identifier with objects that are imported, click the **Overwrite Existing Objects** check box.

8. To import the uploaded template, click **Import**.
   - To cancel the import, click **Cancel**.
9. If the import is successful, the following message is displayed:

   ```
   The import was successful.
   ```

10. Click **Close**.

    Note: If events are imported with your report template, it can take a few minutes before they are available in the event manager.

The report is available for use in the appropriate screen of the destination system.

Chapter 9. Enhancements to Top Movers for cxView

The Top Movers feature enables the tracking and reporting on deviations of values that are monitored by Tealeaf. In IBM Tealeaf cxImpact, Top Movers can be created and reported for event data on a daily basis.

- When an event is created, you can optionally create a top mover to track the changes in values for the event. The top mover enables easier monitoring of changes in key site metrics.

IBM Tealeaf cxView enhances the base Top Mover capabilities with the features listed in the section.

Features

IBM Tealeaf cxView enhances Top Movers with the following features:

1. Hourly Top Movers: Licensees of IBM Tealeaf cxView can create top movers that monitor deviations on an hourly basis. Hourly top movers enable the tracking of changes in key metrics within the day. It detects and responds to changes in visitor behavior and site performance that occur within a single day.
   - Hourly top movers are specified in the top mover definition. For more information about creating hourly top movers, see "TEM Top Movers Tab" in the *IBM Tealeaf Event Manager Manual*.
   - For more information about reporting hourly top movers, see "Analyzing Top Movers" in the *IBM Tealeaf Reporting Guide*.
2. Dimension Top Movers: IBM Tealeaf cxView customers can optionally create top movers to track changes in dimension values.
   - For more information about creating dimension top movers, see "TEM Top Movers Tab" in the *IBM Tealeaf Event Manager Manual*.
   - For more information about reporting dimension top movers, see "Analyzing Top Movers" in the *IBM Tealeaf Reporting Guide*.
3. Ratio Top Movers: IBM Tealeaf cxView customers can also track deviations in values for ratios between events and dimensions.
   - For more information about creating ratio top movers, see "TEM Top Movers Tab" in the *IBM Tealeaf Event Manager Manual*.
   - For more information about reporting ratio top movers, see "Analyzing Top Movers" in the *IBM Tealeaf Reporting Guide*.
4. Alerts on Top Movers: IBM Tealeaf cxView users can create alerts that are based on Top Movers or reports by using Top Movers.
   - For more information about creating Top Mover alerts, see "TEM Alerts Tab" in the *IBM Tealeaf Event Manager Manual*.
   - For more information about creating alerts on Top Mover reports, see "TEM Alerts Tab" in the *IBM Tealeaf Event Manager Manual*.

Creating Top Movers

For more information about creating top movers, see "TEM Top Movers Tab" in the *IBM Tealeaf Event Manager Manual*.

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Reporting on Top Movers

For more information about reporting for top movers, see "Analyzing Top Movers" in the *IBM Tealeaf Reporting Guide*.

Chapter 10. IBM Tealeaf documentation and help

IBM Tealeaf provides documentation and help for users, developers, and administrators.

Viewing product documentation

All IBM Tealeaf product documentation is available at the following website:

https://tealeaf.support.ibmcloud.com/

Use the information in the following table to view the product documentation for IBM Tealeaf:

Table 68. Getting help

To view...	**Do this...**
Product documentation	On the IBM Tealeaf portal, go to **?** > **Product Documentation**.
Help for a page on the IBM Tealeaf Portal	On the IBM Tealeaf portal, go to **?** > **Help for This Page**.
Help for IBM Tealeaf CX PCA	On the IBM Tealeaf CX PCA web interface, select **Guide** to access the *IBM Tealeaf CX PCA Manual*.

Available documents for IBM Tealeaf products

Use the following table to view a list of available documents for all IBM Tealeaf products:

Table 69. Available documentation for IBM Tealeaf products

IBM Tealeaf products	**Available documents**
IBM Tealeaf CX	• *IBM Tealeaf Customer Experience Overview Guide* • *IBM Tealeaf CX Client Framework Data Integration Guide* • *IBM Tealeaf CX Configuration Manual* • *IBM Tealeaf CX Cookie Injector Manual* • *IBM Tealeaf CX Databases Guide* • *IBM Tealeaf CX Event Manager Manual* • *IBM Tealeaf CX Glossary* • *IBM Tealeaf CX Installation Manual* • *IBM Tealeaf CX PCA Manual* • *IBM Tealeaf CX PCA Release Notes*

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Table 69. Available documentation for IBM Tealeaf products (continued)

IBM Tealeaf products	Available documents
IBM Tealeaf CX	• *IBM Tealeaf CX RealiTea Viewer Client Side Capture Manual* • *IBM Tealeaf CX RealiTea Viewer User Manual* • *IBM Tealeaf CX Release Notes* • *IBM Tealeaf CX Release Upgrade Manual* • *IBM Tealeaf CX Support Troubleshooting FAQ* • *IBM Tealeaf CX Troubleshooting Guide* • *IBM Tealeaf CX UI Capture j2 Guide* • *IBM Tealeaf CX UI Capture j2 Release Notes*
IBM Tealeaf cxImpact	• *IBM Tealeaf cxImpact Administration Manual* • *IBM Tealeaf cxImpact User Manual* • *IBM Tealeaf cxImpact Reporting Guide*
IBM Tealeaf cxConnect	• *IBM Tealeaf cxConnect for Data Analysis Administration Manual* • *IBM Tealeaf cxConnect for Voice of Customer Administration Manual* • *IBM Tealeaf cxConnect for Web Analytics Administration Manual*
IBM Tealeaf cxOverstat	*IBM Tealeaf cxOverstat User Manual*
IBM Tealeaf cxReveal	• *IBM Tealeaf cxReveal Administration Manual* • *IBM Tealeaf cxReveal API Guide* • *IBM Tealeaf cxReveal User Manual*
IBM Tealeaf cxVerify	*IBM Tealeaf cxVerify Administration Manual*
IBM Tealeaf cxView	*IBM Tealeaf cxView User Manual*
IBM Tealeaf CX Mobile	• *IBM Tealeaf CX Mobile Android Logging Framework Guide* • *IBM Tealeaf Android Logging Framework Release Notes* • *IBM Tealeaf CX Mobile Administration Manual* • *IBM Tealeaf CX Mobile User Manual* • *IBM Tealeaf CX Mobile iOS Logging Framework Guide* • *IBM Tealeaf iOS Logging Framework Release Notes*

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